# User Guide

12/3/2012

# Contents


NCCDPHP Chronic MIS Navigation and Page Layout ..... 7

NCCDPHP MIS Navigation ..... 7

Page Types ..... 7

Page Layout ..... 8

Entering Information ..... 11

Text Boxes ..... 11

Check Boxes ..... 12

Radio Buttons ..... 12

Drop-down Lists ..... 12

Attachments ..... 13

Attaching Documents: ..... 14

Using the My Reports Option ..... 14

Generating Reports ..... 14

The My Reports Pop-up List ..... 15

Online Help ..... 16

Navigation ..... 16

Program Information Tab ..... 17

Contact Information ..... 17

View Contact Information ..... 17

Edit Contact Information ..... 18

Contact Information Field Instructions: ..... 20

Program Summary ..... 21

Edit Program Summary ..... 21

Resources Tab ..... 23

Personnel ..... 24

Personnel List Page ..... 24

Add/Edit Personnel ..... 24

Add Personnel - Position Details ..... 26

Edit Personnel Information: ..... 27

View Personnel Information ..... 28

Delete Personnel (Member or Position) ..... 29

Personnel – List page ..... 29

Personnel Section Field Instructions: 30
Personnel 30
Partnerships/Coalition (Comprehensive Cancer Control (CCC-703, CCC-1205) FOA only) 34
View/Edit Partnership/Coalition Information 35
Partnerships/Coalition Section Field Instructions: 39
Partnerships/Coalition 39
View/Edit/Delete Partnership/Coalition Information 39
Leadership Team (Strategic Alliance for Health & CTG FOAs only) 43
Leadership Team Field Instructions 46
Partners 48
Partner List Page 48
View Partner 49
Add/Edit Partner Information 49
Edit Partner: 51
Delete Partner Information 52
Partner Information Fields 53
Contracts/Consultants 55
Contract/Consultant Information – List Page 55
Add Contract/Consultant 56
Edit Contract/Consultant 56
Delete Contract/Consultant Information 57
Financial Tab (Comprehensive Cancer control (CCC) FOAs Only) 60
Leveraged Funds 60
Leveraged Funds List page 60
Add/Edit Leveraged Funds Information 61
Delete Leveraged Funds 62
Leveraged Funds Field Instructions: 63
In Kind Contributions (Comprehensive Cancer Control (CCC) FOAs only) 64
Add/Edit In-Kind Contributions 64
In-Kind Contributions Field Instructions 65
Planning Tab 66
Data Sources 66

Add Other Data Source: ..... 68
Plans & Logic Models ..... 69
Plans and Logic Models – List page ..... 69
Add Plans and Logic Models ..... 69
Edit Plans and Logic Models ..... 70
Delete Plans and Logic Models ..... 70
Evaluation (Comprehensive Cancer Control (CCC) FOAs only) ..... 72
Evaluation - List Page ..... 72
Planning: Evaluation Add/Edit ..... 72
Planning: Evaluation Documents ..... 75
Planning: Evaluation Documents Add/Edit ..... 75
Evaluation Field Instructions ..... 76
Action Plan ..... 79
Introduction: ..... 79
Action Plan Summary Page ..... 80
Add a Project Period Objective: ..... 81
View, Edit or Delete a Project Period Objective: ..... 83
Add an Annual Objective: ..... 84
Add Progress for a Project Period Objective (PPO Progress): ..... 86
View or Edit or Delete Progress for a Project Period (PPO Progress): ..... 87
Add Progress for an Annual Objective: ..... 88
View, edit or delete Annual Objective Progress: ..... 90
Add Activity for an Annual Objective: ..... 92
Action Plan – Activity Page ..... 95
Add a Product for an Annual Objective: ..... 96
View, edit or delete Annual Objective Products: ..... 97
Add/View/Edit/Project Period Objective ..... 98
Delete Project Period Objective ..... 101
Project Period Objective Progress ..... 102
Add/View/Edit/Project Period Objective Progress Entry ..... 102
Delete Progress Period Objective Progress Information ..... 104
Annual Objective Summary ..... 104

Add/View/Edit/Annual Objective ..... 104
Delete Annual Objective ..... 108
View Objective History ..... 109
Annual Objective Progress ..... 109
Add/View/Edit/Annual Objective Progress Entry ..... 109
Delete Annual Objective Progress Information ..... 112
Activities ..... 112
Add/Edit/View Activities ..... 112
Delete Activity ..... 114
Products ..... 114
Add/Edit/View Product ..... 115
Delete Product ..... 116
Community (HCP Achieve, SAH and PHC; CTG/CTG National FOAs only) ..... 118
Community Action Plan Summary (CAPs) ..... 118
Add Community ..... 119
Edit Community ..... 121
Delete Community ..... 122
CAP - Project Period Progress, Annual Objective, Annual Objective Progress, Activities ..... 123
Community Action Plan Field Instructions ..... 124
Community Project Period Objective ..... 126
Project Period Objective Progress ..... 127
Annual Objective ..... 128
Annual Objective Progress ..... 130
Activities ..... 131
Add/Edit/View Product ..... 131
Assessments ..... 133
Assessments List Page ..... 133
Add Assessment ..... 133
Edit Assessment Page ..... 134
Delete Assessment ..... 134
Assessment Field Instructions ..... 135
CHANGE Tool ..... 136

CHANGE Tool List Page ..... 136
Add Change Tool ..... 136
Edit CHANGE Tool ..... 137
Delete CHANGE Tool ..... 138
CHANGE Tool Field Instructions ..... 139
Reports Tab ..... 141
Interim Report Instructions: ..... 142
Annual Report Instructions ..... 151

# NCCDPHP Chronic MIS Navigation and Page Layout

This section provides information about navigating within the NCCDPHP Chronic MIS sections and describes the format and uses of the various page types within the system.

## NCCDPHP MIS Navigation

The system has tabs at the top of each page that are used to navigate the various sections of the MIS. Each tab covers a different topic and contains one or more sections that are used to view, enter or update information.

## Page Types

There are six types of pages used in NCCDPHP MIS.

1. Summary page: Lists one or more similar items, such as staff member names. Summary pages are used to access all information for each section.
2. Add page: Allows input of new information.
3. Edit page: Allows modification of existing information.
4. View page: Displays existing information. Information cannot be updated on view pages.
5. Delete page: Allows for confirmation of a delete.
6. Attachments page: Allows the uploading of file attachments.

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**Note**

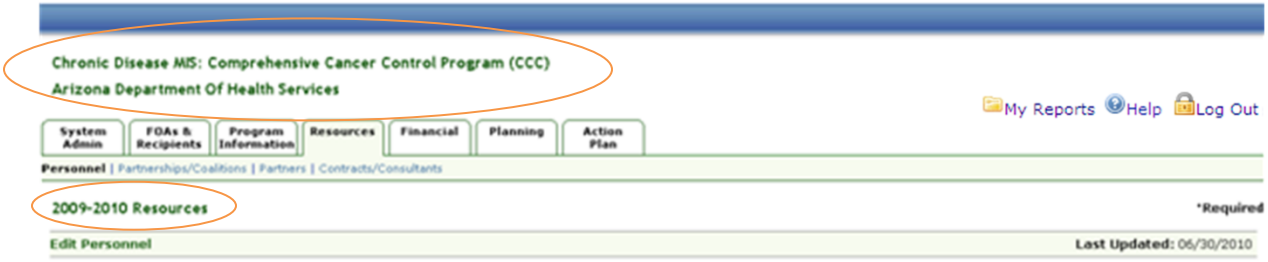
Only Users with Full Access will be able to access all types of screens. Users with 'Read Only' access will only be able to access the Summary and View screens.

The tabs and sections visible to each user is based their access level. Most users will only have access to the tabs listed on the right of the FOA & Recipients tab (Program Information, Resources, Financial, Planning, Action Plan, etc.)

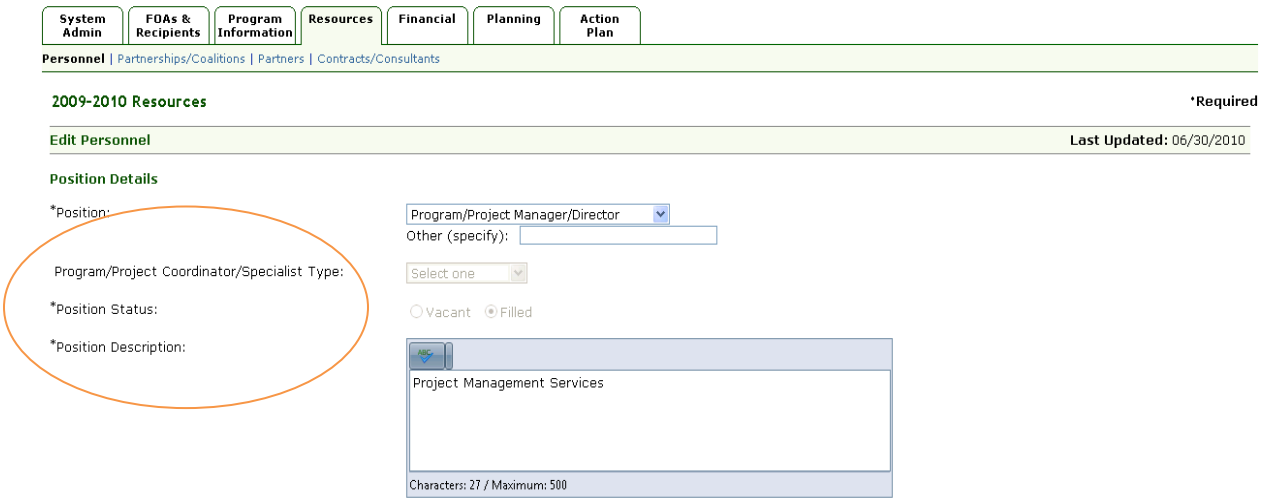
## Page Layout

The pages have several features in common:

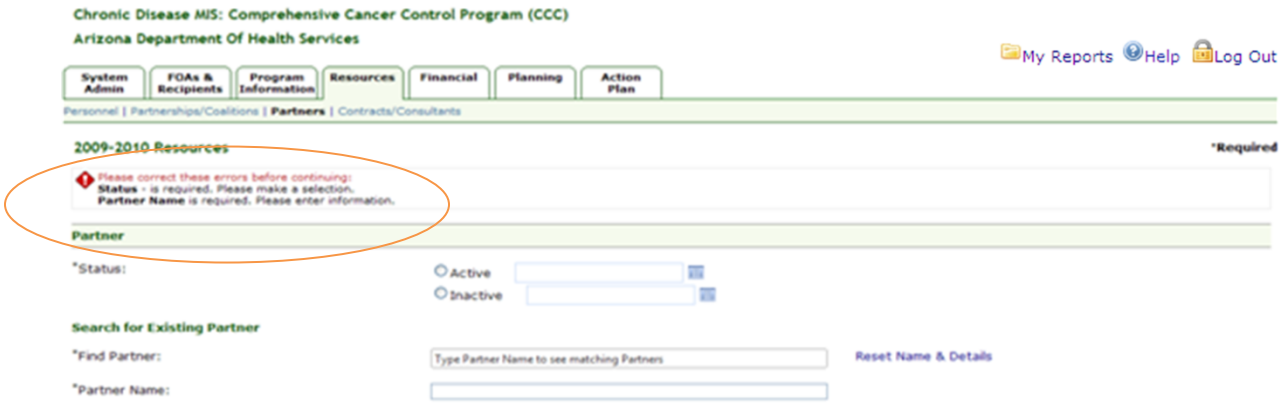
- The **Program and Grantee Names** are displayed at the top left side of each page.
- The **Budget Period** is displayed at the top right of all summary pages. The budget year always defaults to the current year.




- **Required information** is displayed with an asterisk (*) to the left of the field name.

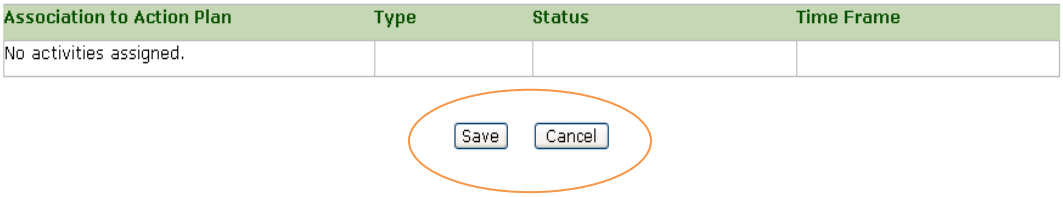



- **Error messages** are displayed at the top of the page. All errors must be corrected before the information can be saved.




- Links to add, edit, view or delete information, upload attachments, or return to a previous page are displayed in blue and underlined (similar to any type of Internet hyperlink). The edit, view, and delete links are usually displayed to the right of the entry.
- Links to add information are usually located at the top left, next to the section name in the header bar
- Every page has a link to the online Help and to the My Reports option (see [ ] for more information on My Reports)
- Every page is printable

- ***Save*** and ***Cancel*** buttons are usually located at the bottom of each enter and edit page. Click on 'Cancel' to discard any changes. Click on 'Save' to save information.

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Note

- *If any fields on the page are incomplete or invalid when the 'Save' button is clicked, the system will display an error message. The invalid fields must be corrected before the information can be saved.*

| | |
|---|---|
| Important | ▪ If you navigate away from a page without clicking the 'Save' button, all changes will be lost. |

# Entering Information

The Chronic MIS uses five methods for entering information:

- Check boxes
- Text boxes
- Radio buttons
- Drop down lists
- File uploads

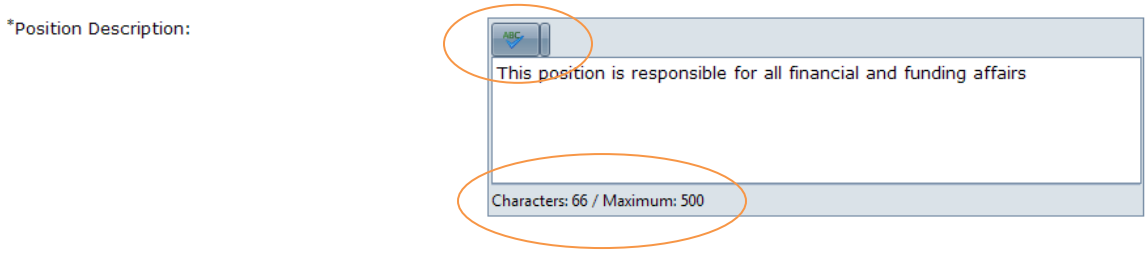
## Text Boxes

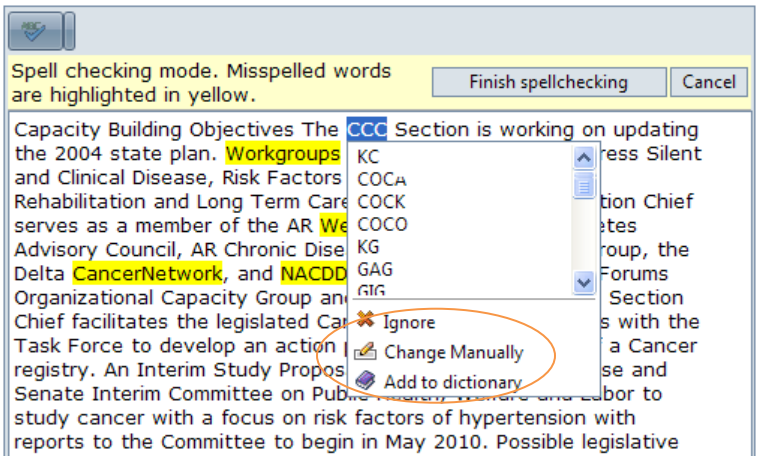
Text boxes are used for questions that are open ended. Text boxes allow you to enter free form text. You can use the keyboard to enter information or copy and paste information from another document into text boxes.

Each text box accommodates a limited number of characters/words which varies depending on the amount of information requested. The maximum number of characters is displayed at the bottom of each text box. A count of the characters used is also displayed and incremented as text is entered.

**Spell-check** feature is included in each text box. Click on the spell check ico in the upper left corner of the text box to start the spell-checker. This functions much like the spell checker in Word. Misspelled words are highlighted in yellow and a list of replacement words is displayed with the option to change or ignore the misspelled word.

Text Box Examples:



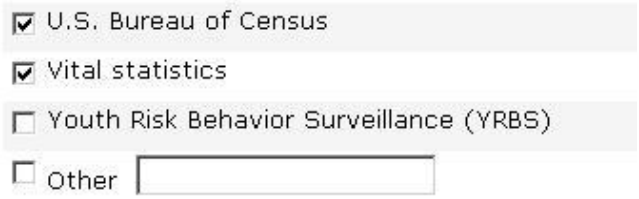
## Check Boxes

Check boxes are used for questions that allow more than one response option. Check boxes allow you to select multiple responses from a list of several response options. Whenever check box options are displayed, you may select all the options that apply. In cases where you can check only a certain number of boxes, additional instructions will be included below the field name.

To check an option, click inside the check box and a check mark will appear in the box. To uncheck a selected option, click inside the check box again and the check mark will be removed.

For most check box lists, the last option is an 'Other' check box that allows you to add one or more items that are not in the check box list. When you select an 'Other' check box, you must specify the other items in the text box provided.

Check Box Example:

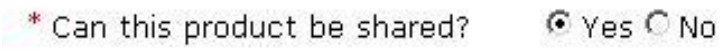



## Radio Buttons

Radio buttons are used for questions that require only one response option to be selected. Radio buttons allow you to select one response option from a list of two or more response options. A common example is when there is a question requiring a Yes or No answer.

To select a radio button, click inside the circle. A dot will appear in the circle. To change the selection, click inside the other circle. The dot will be removed from the one circle and appear in the other.

Radio Button Example:



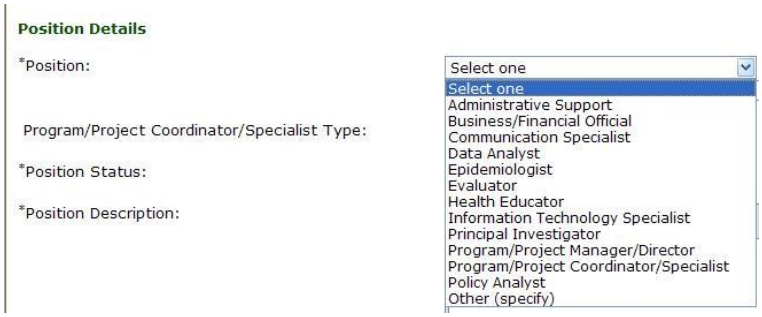

## Drop-down Lists

Drop down lists are used for questions that require only one response option to be selected. Drop-down lists display several items from which you can select only one item.

To select an item from a drop-down list, you simply click the down arrow in the box and select the desired item from the displayed list. You can scroll up or down a displayed list to view all the items displayed on a list before selecting one.

Most drop-down lists in the Chronic MIS are static lists. That is, they are pre-populated with information and you cannot change the lists. However, some of the drop-down lists are dynamic lists. These are the drop-down lists that contain information like personnel members or partners. They are referred to as dynamic because they are created solely from the names you enter into the Chronic MIS and are updated every time you add a new name.

Drop-down Example:




## Attachments

You can attach files into some sections of the Chronic MIS. Attaching a file is simply saving a copy of a document into the system. The maximum file size that can be uploaded is 10MB.

The procedure for uploading files is the same throughout the system. All the steps for uploading files are explained here as well as in the online Help.

The Chronic MIS can accommodate the following types of attachments:

Microsoft Word (.doc)
WordPerfect (.wpd)
PowerPoint (.ppt)
Excel (.xls)
Adobe (.pdf)
HTML (.htm or .html)
rich text (.rtf)
text (.txt)
zipped (.zip).

Use of trade names is for identification only and does not imply endorsement by the U.S. Department of Health and Human Services.

Note

Before uploading a document, it is recommended that you protect the document by making it a “read-only” file. This will prevent other users from unintentionally changing the document. (For further instructions on protecting files, consult your network support team or your word processing guide.)

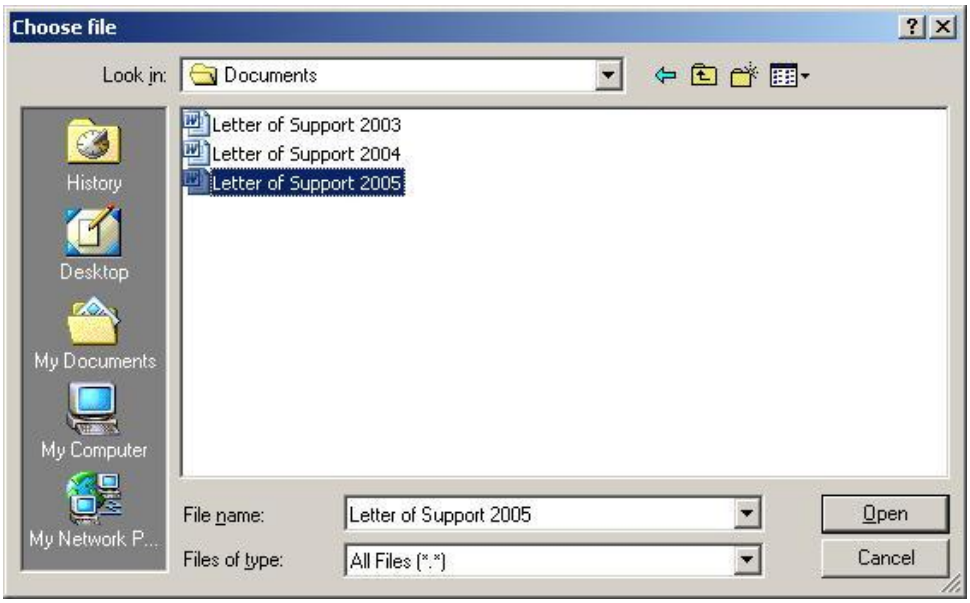
Any number of versions of a document can be uploaded. That is, when you update a document, such as a state plan, you can upload each version as it gets updated.

### Attaching Documents:

Use the ‘Browse’ button to search your local or network drives for the file to be attached. Use the following steps:

1. Click Browse.
2. Scroll through the list of folders that are displayed.
3. Double-click on the appropriate folder.
4. Click again on the file name of the document you want to upload.
5. Click the ‘Open’ button (or double click on the file name).

*This process is similar to the same process for attaching a file to an E-mail. An example of a dialog box for selecting a folder is displayed below.*

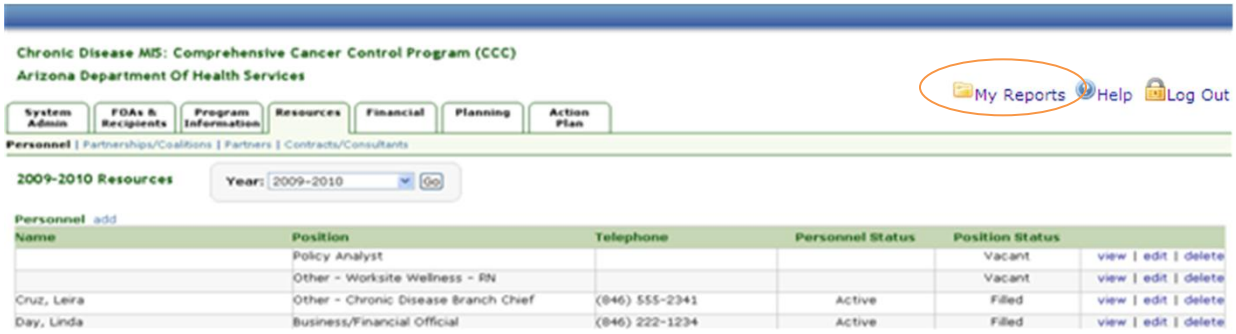



*After clicking the ‘Open’ button, the document’s entire path and file name is displayed in the ‘File’ text box within the Chronic MIS.*

## Using the My Reports Option

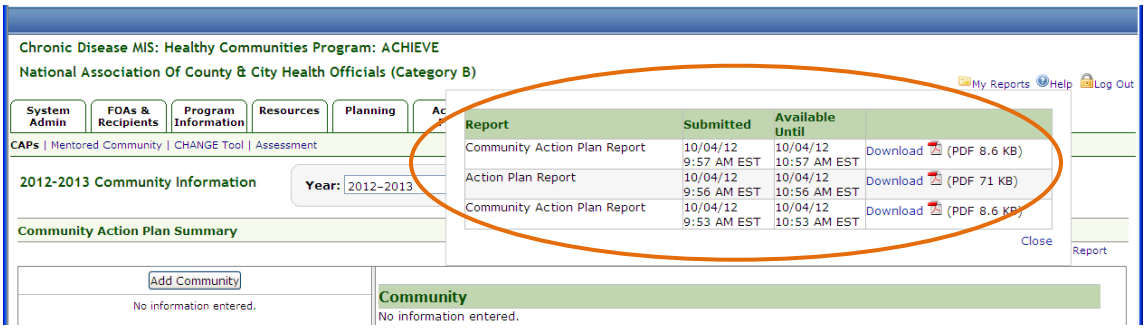
### Generating Reports

When you “print” a report (e.g., action plan summary report, interim progress report), the report is sent to a processing queue. As the report is processing, you can continue with your work in the MIS. To check the status of a printed report and download it, click the My Reports option.




## The My Reports Pop-up List

Clicking My Reports displays the My Reports pop-up list, which shows all generated reports that are processing or have completed processing and are available for download. Click the Download link to open a report file or save it locally.




**Note the following**:

- The My Reports option is available for all reporting years.
- Generated reports in the My Reports list are available until the “Available Until” time, which is 18 hours from the “Submitted” time (Eastern Standard Time), or until you click the “Download” link.
- If you generate the same report multiple times, the most recently generated document appears highest in the list.
- Final progress reports are still available under the Reports tab, but you can check the processing status in the My Reports list.

# Online Help

When you click on the online Help link, the Help for the current section will be displayed. Each Help screen provides you with a description of the section, general explanation of the screen, specific instructions for adding or editing information within the section, some examples for responses as appropriate, and definitions of terms and fields used in the section, as needed.

## Navigation

Once you are in the online Help, you can use the Hide Navigation Pane/Show Navigation links at the top right of each Help screen to toggle between displaying the navigation pane and hiding the navigation pane. The navigation pane provides an outline of the Help sections.

To show the navigation pane, click the *Show Navigation Pane* link. Click on any Help screen to access it.

***Quick Tip:*** You can print any online Help screen by using the print function on your Web browser.

# Program Information Tab

**Introduction:** The Program Information tab is used to document and maintain program contact information, executive summary and identifies key personnel members for quick reference. The Program Information tab consists of two sections:

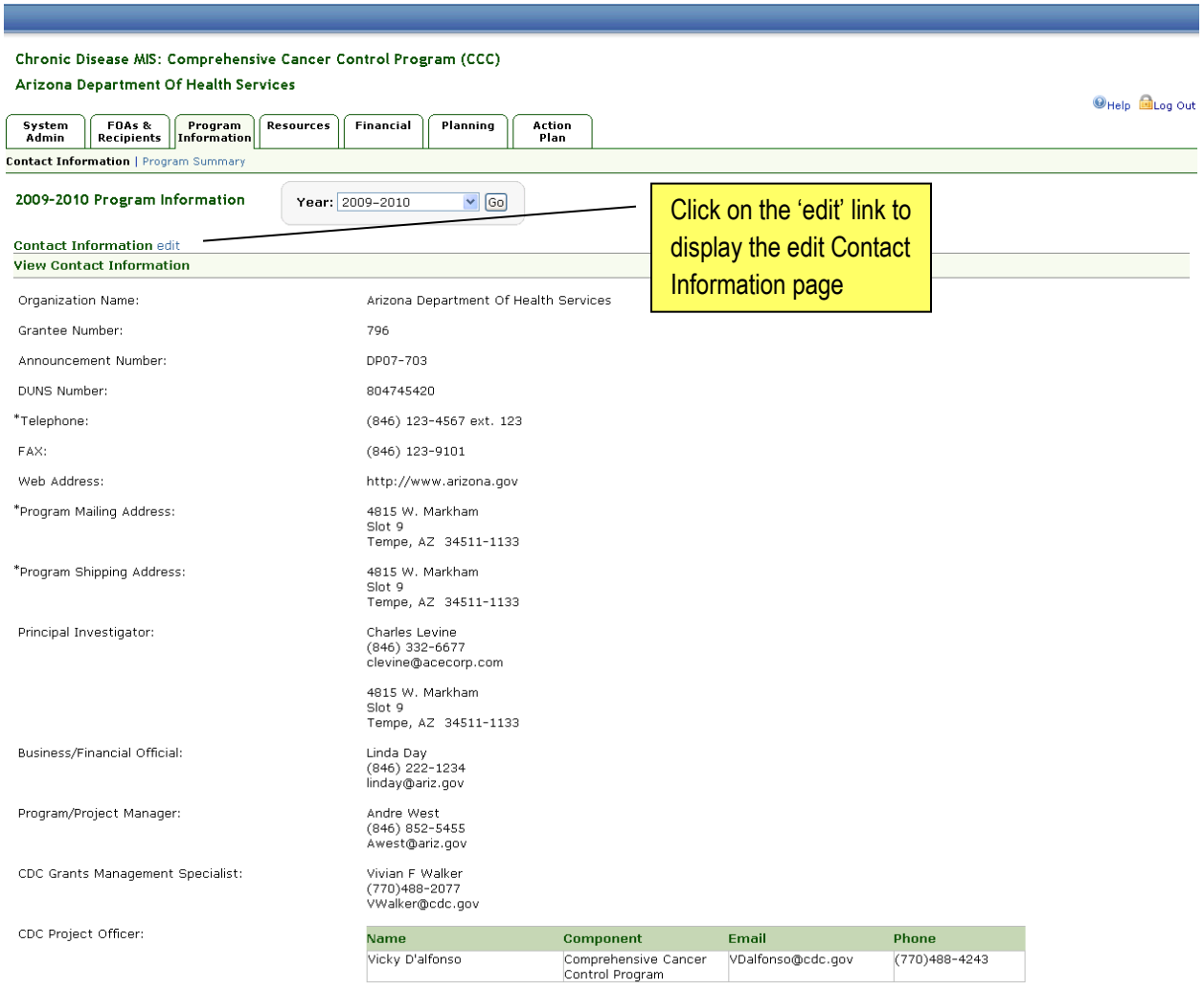
- **Contact Information** - used to maintain information about the grantee organization such as name, address, principal investigator, CDC project officer, and the Announcement & DUNS number.

- **Program Summary** – used to maintain the Grantee Type, Funding Level and the Executive Summary.

## Contact Information

### View Contact Information

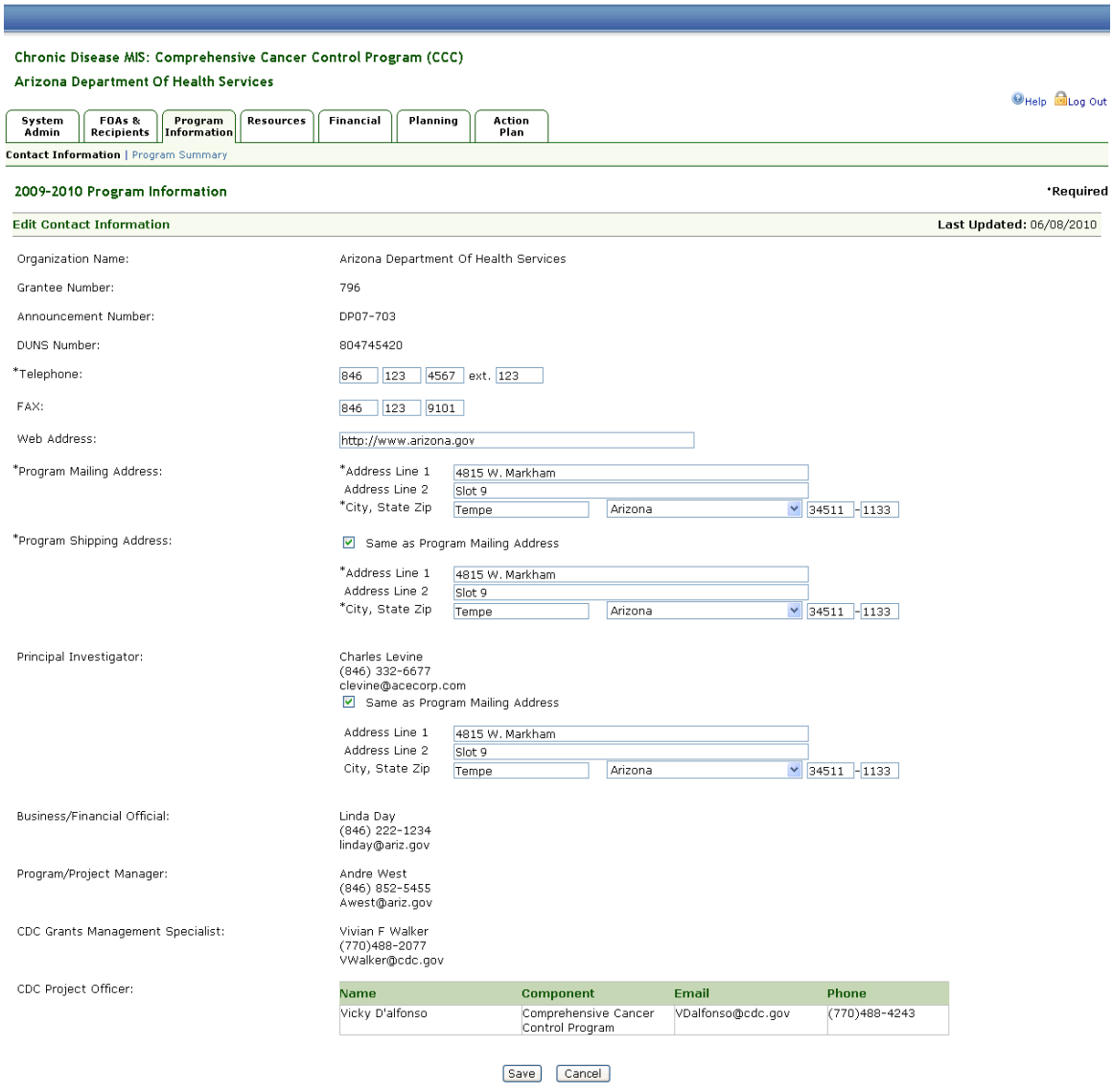
The View contact information page is the initial page displayed when the Program Information tab is selected. Information on the 'View' page is read-only and cannot be modified. Users with read-only access will not be able to select the 'edit' link.



## Edit Contact Information

To Edit Contact Information:

1. Click on the Contact Information 'edit' link to display the 'Edit Contact Information' page.
2. Click in the field to be edited or select a new value from a check list or drop down list
3. Type the new information in the field. If changing data in existing fields, delete or type over the old data.
4. Click the Save button to commit your changes.



- The following fields are populated from existing CDC applications and cannot be edited by grantees. Please contact your CDC Project Officer to make updates to this information:
  - Organization Name
  - Grantee Number
  - Announcement Number
  - DUNS Number
  - CDC Grants Management Specialist
  - CDC Project Officer

- The Principal Investigator, Business/Financial Official, Program/Project Manager cannot be changed in the Contact Information edit. They may be changed in the Personnel section of the Resources tab.

## Contact Information Field Instructions:

| Field or Section | Instructions |
|---|---|
| **Organization Name** | The organization name defaults from EPMIS and cannot be changed. |
| **Grantee Number** | The grantee number defaults from an existing MIS database and cannot be changed. |
| **Announcement Number** | The announcement number defaults from an existing MIS database and cannot be changed. |
| **DUNS Number** | The DUNS number defaults from EPMIS and cannot be changed. |
| **Telephone*** | Enter the program's primary telephone number by entering the first three digits in the first text box, the next three digits in the second, and the last four digits in the third text box.<br>Specify a five-digit extension number in the *ext*. field if one has been assigned to the program. |
| **FAX** | Enter the program's fax number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box. |
| **Web Address** | Enter the program's full web site address, for example: *http://www.cdc.gov.* |
| **Program Mailing Address*** | Enter the program's mailing address as follows:<br>**Address Line 1*: Enter the first line of the address, for example, 100 Peachtree Street. Maximum text is 100 characters, about 20 words.<br>*Address Line 2*: Enter the second line of the address if necessary, for example, Koger Center, First Floor. Maximum text is 100 characters, about 20 words.<br>*City*: Enter the city, for example, Atlanta. Maximum text is 50 characters, about 10 words.<br>*State*: Select a state from the drop-down list.<br>**City, State, Zip:* Enter the five-digit zip code in the first text box. Specify a four-digit extension of the zip code if necessary.<br>Note: Address Line 2 and the four-digit zip code extension fields are optional. |
| **Program Shipping Address*** | Select the *Same as Program Mailing Address* text box if the program mailing address is the same as the program shipping address. The system populates the shipping address fields with the previously entered mailing address. If the mailing address and shipping address are not the same, complete the shipping address fields as follows:<br>**Address Line 1*: Enter the first line of the address, for example, 100 Peachtree Street. Maximum text is 100 characters, about 20 words. |

| | |
|---|---|
| | *Address Line 2*: Enter the second line of the address if necessary, for example, Koger Center, First Floor. Maximum text is 100 characters, about 20 words.<br>*City*: Enter the city, for example, Atlanta. Maximum text is 50 characters, about 10 words.<br>*State*: Select a state from the drop-down list.<br>**City, State, Zip:* Enter the five-digit zip code in the first text box. Specify a four-digit extension of the zip code if necessary.<br>Note: Address Line 2 and the four-digit zip code extension fields are optional. |
| **Principal Investigator** | The Principal Investigator's name, telephone number, and E-mail address defaults from the Personnel section and cannot be changed. If no principal investigator name exists in the Personnel section, this field displays "No information entered". |
| **Business/Financial Official** | The Business or Financial Official's name, telephone number, and E-mail address defaults from the Personnel section and cannot be changed. If no principal investigator name exists in the Personnel section, this field displays "No information entered". |
| **Program/Project Manager** | The Program Director's name, telephone number, and E-mail address defaults from EPMIS and cannot be changed. |
| **CDC Grants Management Specialist** | The CDC Grant Specialist's name, telephone number, and E-mail address defaults from EPMIS and cannot be changed. |
| **CDC Project Officer** | The CDC Project Officer's name, telephone number, and E-mail address defaults from EPMIS and cannot be changed. |
| **Save** | Click *Save* to save the information you entered. The system saves the information and returns you to the View Contact Information page.<br>If any fields on the page are incomplete or invalid when you click *Save*, the system displays an error. Correct all invalid fields and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and re-display the View Contact Information page. |

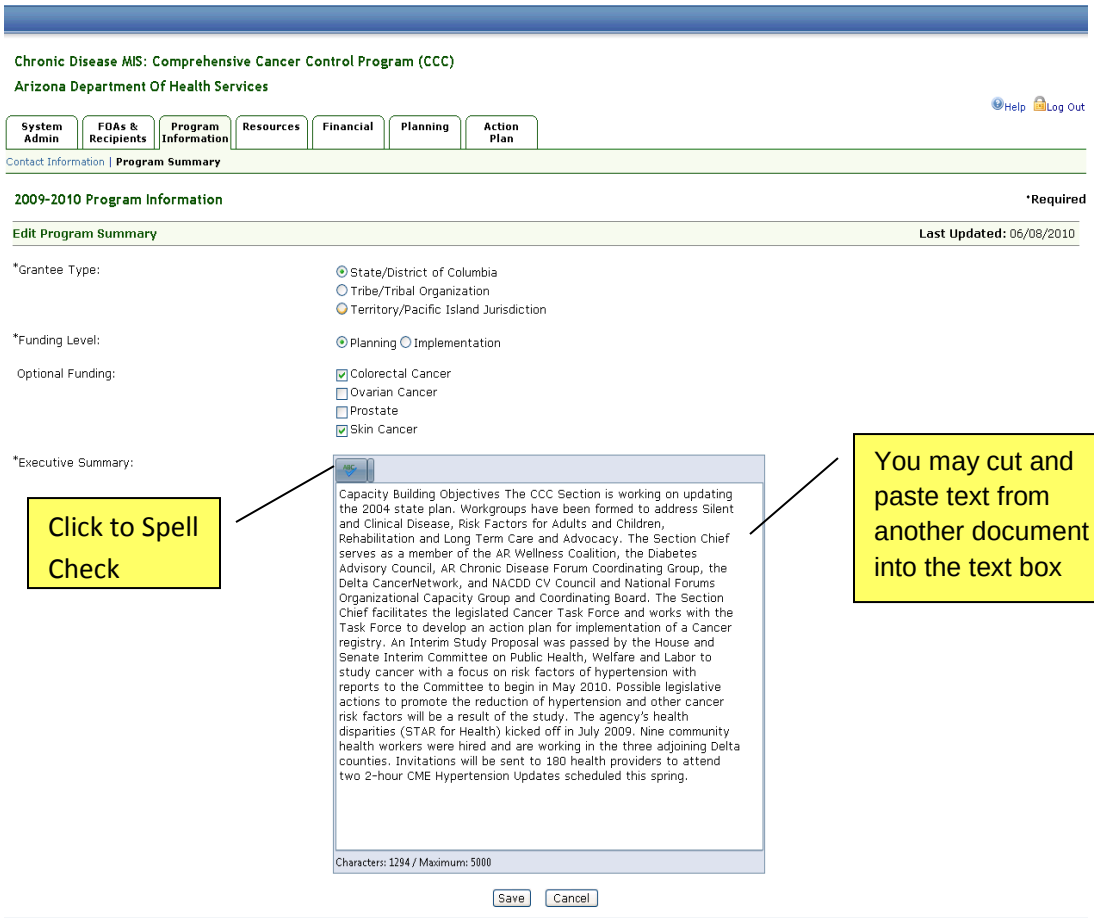
* = Required field

## Program Summary

### Edit Program Summary:

1. From the Program Information Tab, click on the Program Summary page.
2. Click on the Program Summary ‘edit’ link to display the ‘Program Summary Edit’ page.

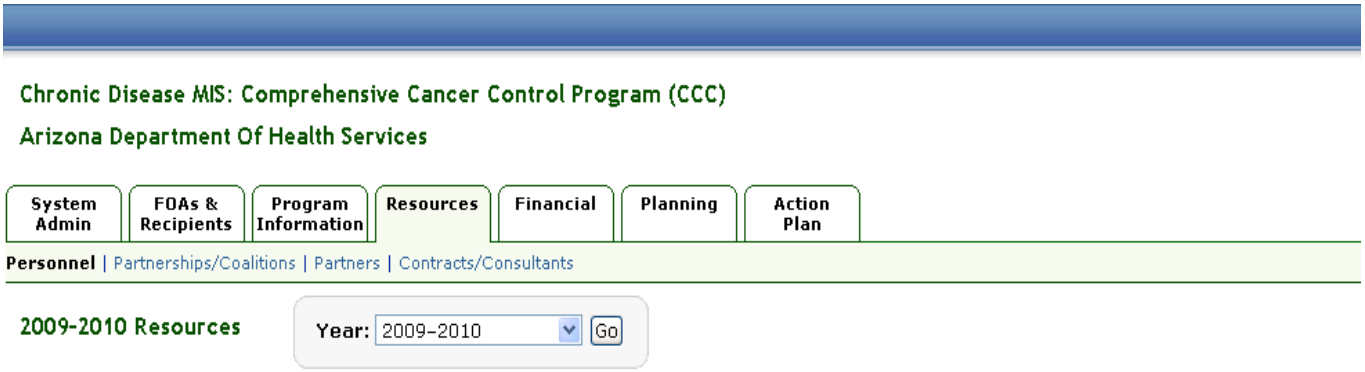
3. Click in the field to be edited or select a new value from a check list or drop down list. To update the Executive Summary, type the new information in the text field or cut and paste text from an existing document.
4. Click the Save button to commit your changes.



# Resources Tab

**Introduction:** The Resources Information tab contains the following sections:

- **Personnel** – used to maintain information for key personnel members who perform essential program functions.
- **Partnerships/Coalitions (used by the Comprehensive Cancer Control FOA only) -** maintain information about the partnerships and coalitions in your program. Coalitions are groups of stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project.
- **Partners** - maintain information about organizations or persons that collaborate with the recipient to accomplish program work
- **Contracts/Consultants -** maintain information about the contracts and consultants for your program. Contracts and consultants are individuals or organizations that receive funds in exchange for program specific work; they are not "state outsourced contractors".

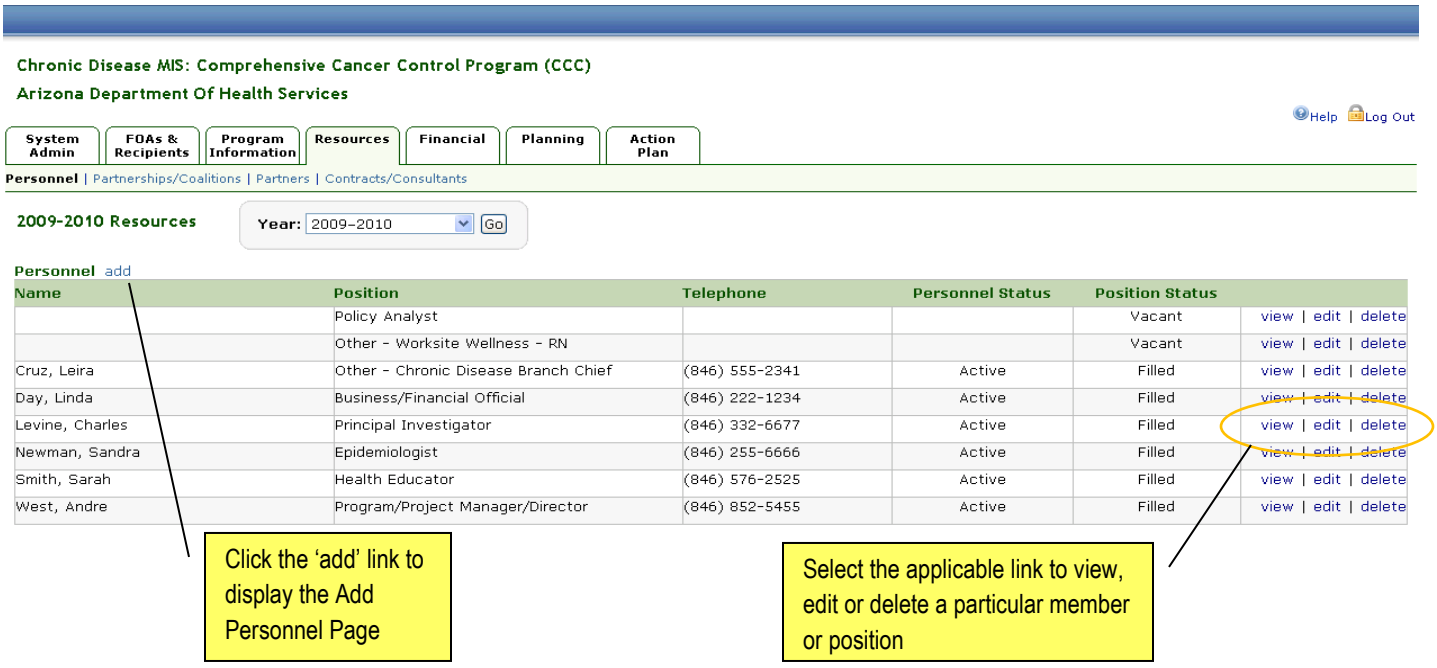


# Personnel

Use the Personnel section to add information for key personnel members, who perform essential program functions, and to edit, view or delete personnel information. Program personnel includes full time, part time, or contracted individuals, either funded by the cooperative agreement or in kind. Any number of staff members can be entered and maintained on this page.

## Personnel List Page

The Personnel List page provides a high-level view of all personnel including vacant positions, added for the grantee. From the List page, you can add a new personnel member or view, edit or delete an existing member.



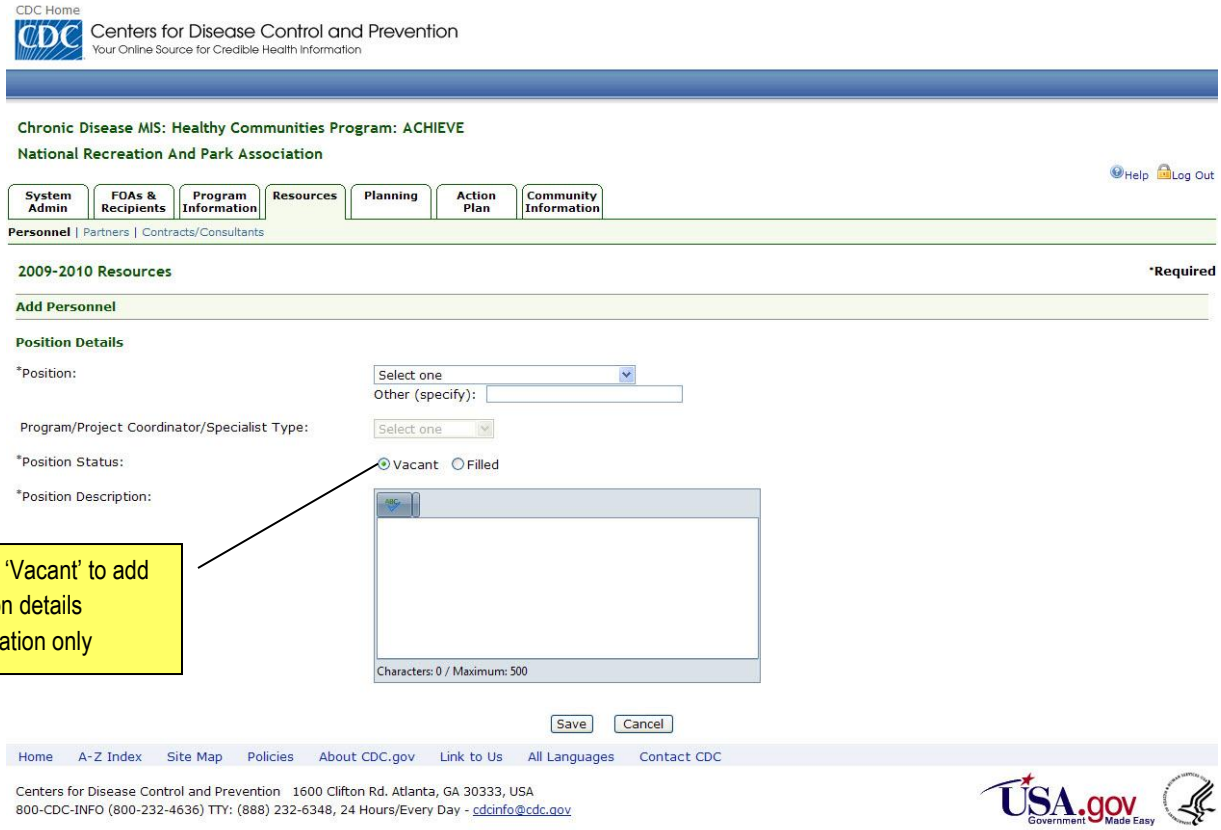

## Add/Edit Personnel

- Personnel information may be added for a 'vacant' or 'filled' position. When the position status is 'vacant', the 'Add Personnel' page is displayed with the position details only. If the position status is 'filled', the page is displayed with both the Position and Personnel Details.

- Both the Add and Edit Personnel pages contain the same fields. On the Add page, all fields are blank. The Edit page displays the current information for the personnel member or position being edited.

## To add a Personnel member or Position:

1. Click the 'add' link on the Personnel List page to display the 'Add Personnel' page. The page is displayed with position details fields only. This provides the option to add a vacant position when a personnel member has not been identified to fill the position.



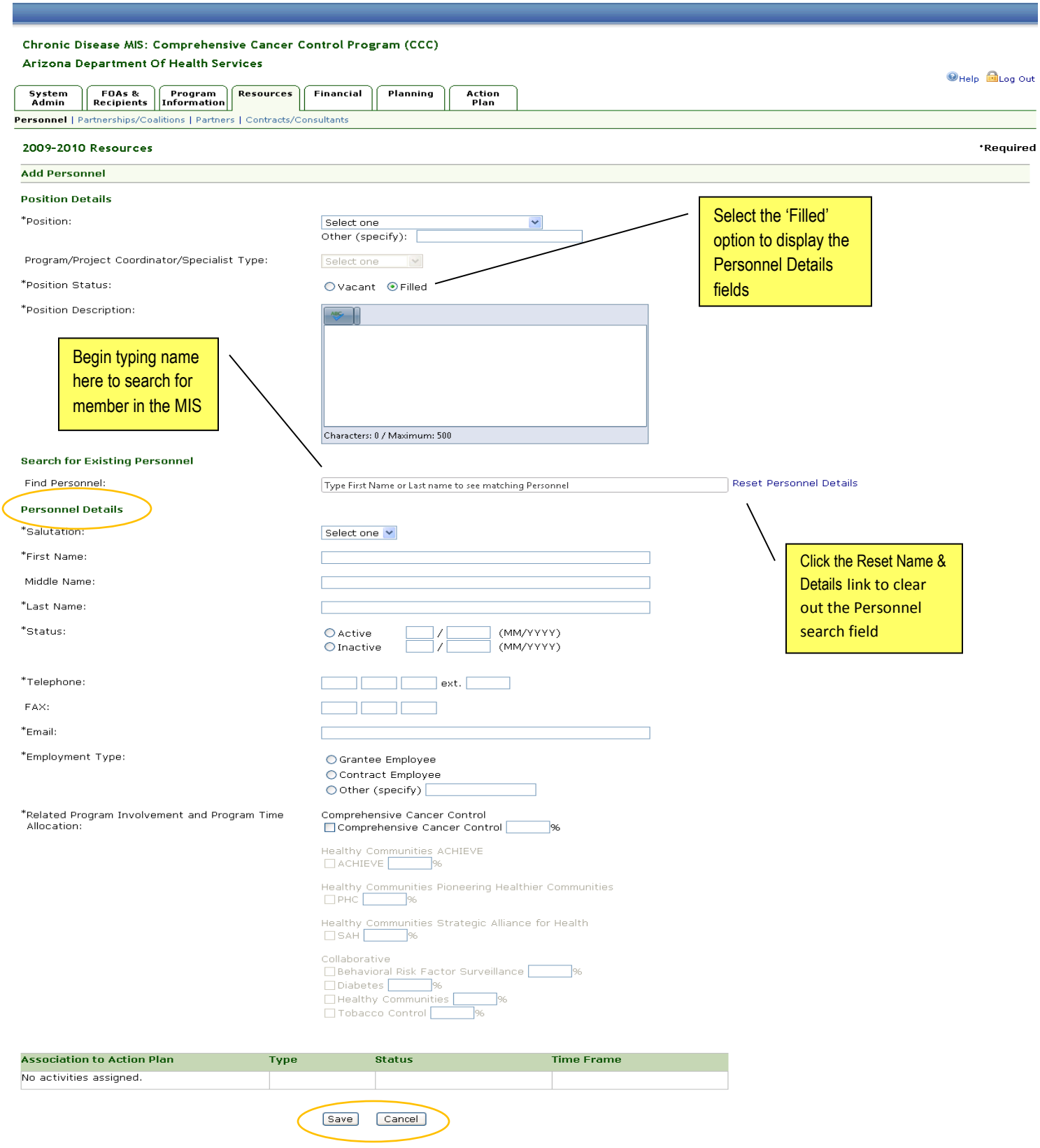

Select 'Vacant' to add position details information only

2. If a personnel member has been identified for the position, select the 'filled' option for the Position Status field to display the Personnel Details fields:
    a. In the 'Find Personnel' field, begin typing the personnel member's name. The system will immediately display all personnel names in the MIS matching the letters typed. As more letters are typed, the list will get smaller.
    b. If the member name appears in the search list, click it to populate the Personnel Details fields.
    c. If the personnel member was not found in the MIS, a message indicating that a match was not found will be displayed in the 'Find Personnel' search field. Enter the member's information in the Position Details fields.
3. Complete the remaining fields to add the personnel member.
4. Click the save button.

**Note**

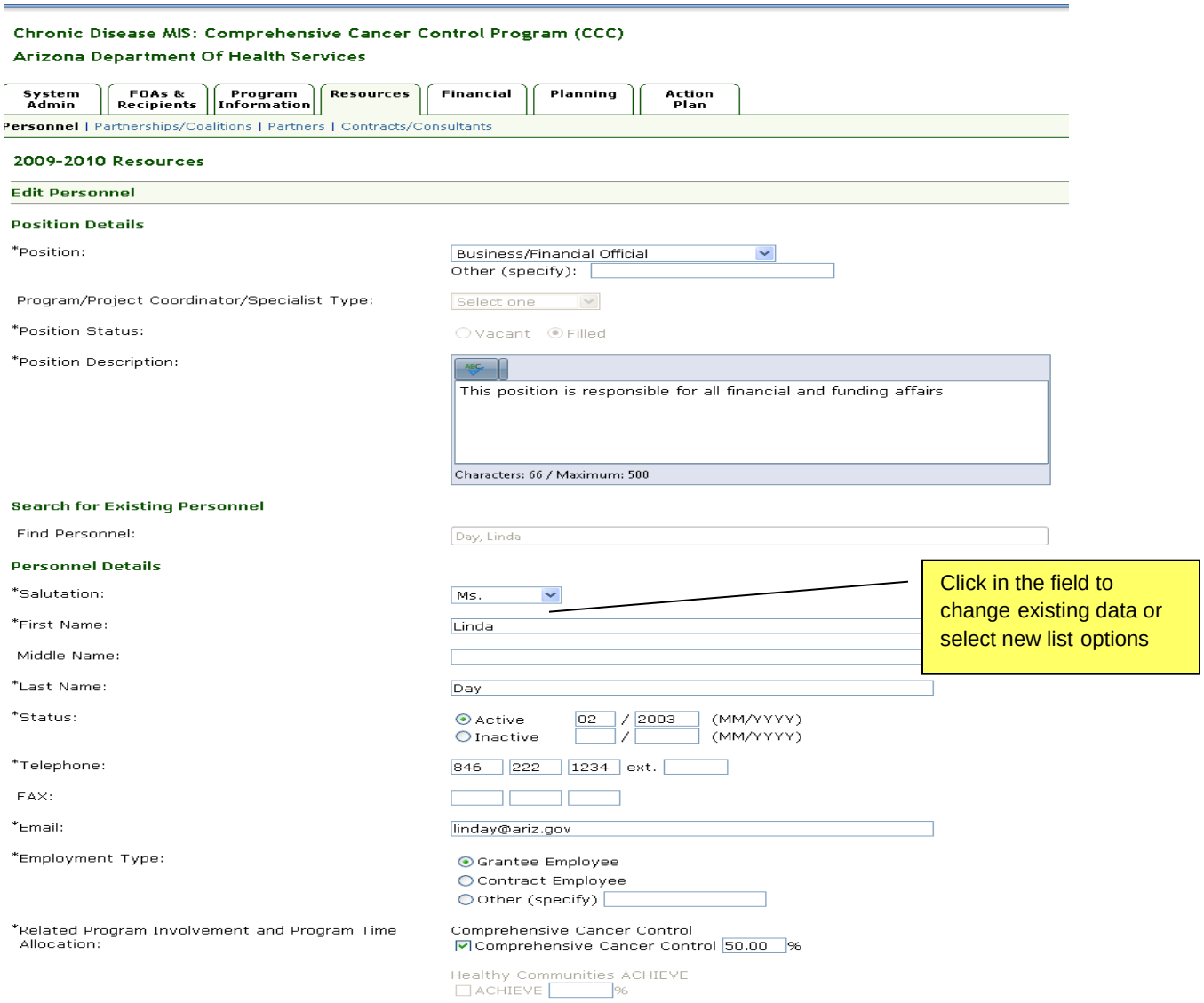
*To add a personnel member to a vacant position, edit the vacant position and change the position status to 'filled'. The page will refresh to display the personnel details fields.*

# Add Personnel - Position Details



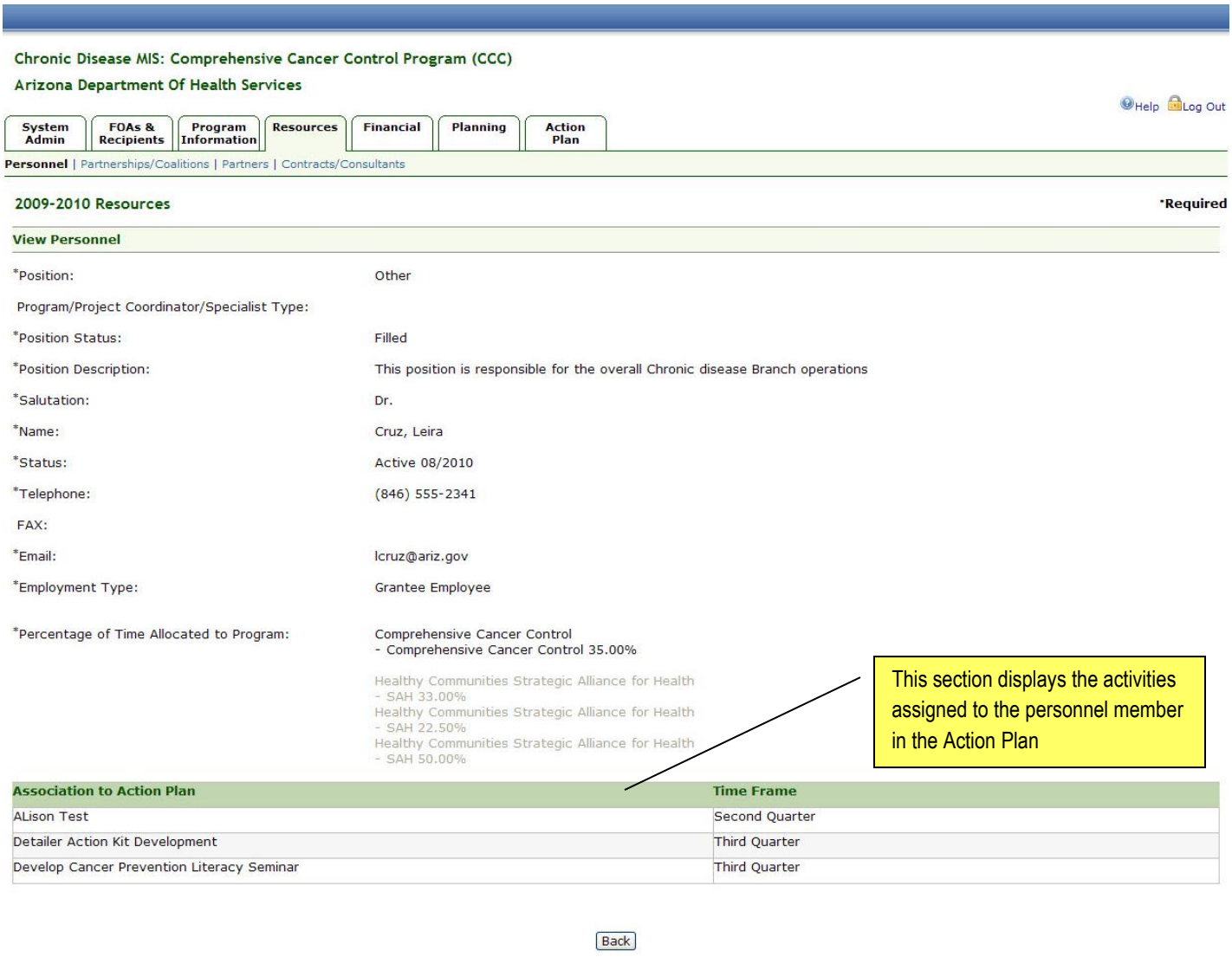
## Edit Personnel Information:

1. From the Personnel List page, click the 'edit' link for the personnel member or position be edited.
2. The Edit Personnel page will be displayed with the current information for the personnel member or position. Click in the field to change existing data or select new list options. Please see the 'Personnel Section Field Instructions' at the end of this chapter for detailed instructions for each field.
3. Click the 'save' button to commit your changes or 'cancel' button to exit the page without saving.



## View Personnel Information

The ‘View Personnel’ page displays information for an existing personnel member or vacant position in a read-only format.



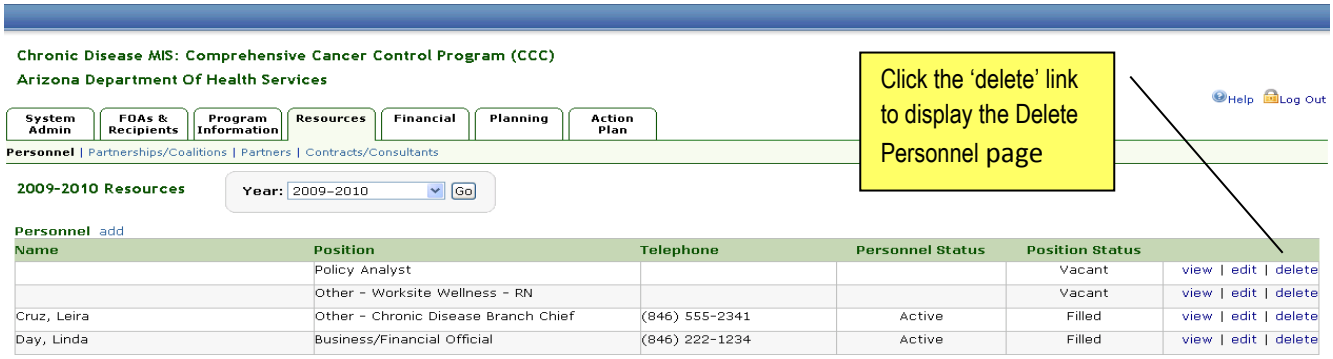
## Delete Personnel (Member or Position)

When deleting a personnel member or position, you will be asked to confirm your decision. If the personnel member is the 'Key personnel member assigned' to an action plan activity, the personnel member will be also removed from the action plan activity. Before deleting a personnel member, all Action Plan Activities assigned to the personnel member must be reassigned to another 'Active' personnel member.

To delete a personnel member or vacant position,

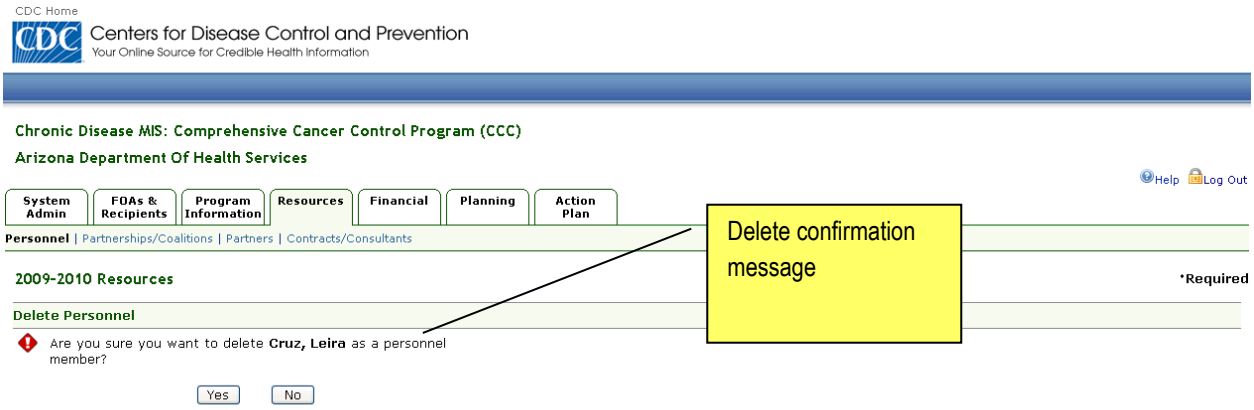
1. From the Personnel List page, click the 'delete' link on the row with the member or position to be deleted

### Personnel – List page




2. The Delete Personnel page will be displayed with the delete confirmation message.
3. Select the 'Yes' button to proceed with the delete, or 'No' to cancel delete.

### Delete Personnel page




*It is recommended that you edit a personnel member and change their Status to 'inactive' instead of deleting the member.*

**Personnel Section Field Instructions:**

# Personnel

Use the Personnel section under the Resources tab to identify key personnel members who perform essential program functions, edit personnel information, view personnel information, or remove personnel. Program personnel includes full time, part time, or contracted individuals, either funded by the cooperative agreement or in kind. Any number of staff members can be entered and maintained on this page.

The following actions can be performed in the Staff section:

- *Add:* Click this link to add a new personnel member to the list.
- *View:* Click this link to view existing personnel information.
- *Edit:* Click this link to edit existing information about a specific personnel member.
- *Delete:* Click this link to remove a personnel member. Any member deleted from this section will also be deleted from any assigned action plan activities for the current budget year.

  *Note:* In order to maintain a history of personnel member information, it is recommended that personnel members are not deleted. However, if a personnel member is entered by mistake, it is appropriate to delete the information.

### Add/Edit/View Personnel Information

The pages for entering initial information and modifying existing information for personnel members are identical. The only difference is that the Edit page displays the existing information for the personnel member while the fields in the page for entering initial information are blank. The page for viewing information is the same as the add and edit pages, however, you cannot change any information.

| Field/Section/Button | Instructions |
|---|---|
| **Position*** | Select the personnel member's primary role from the drop-down list.<br><br>If the desired role is not in included in the drop-down list, select *Other*, and enter the role in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words. |
| **Program/Project Coordinator/Specialist Type** | If you selected Program/Project Coordinator/Specialist in the Position field, select the Program/Project Coordinator/Specialist type from the drop down list. The types are<br><br>*Note:* This field is enabled and required if you selected Program/Project Coordinator/Specialist in the Position field. |
| **Position Status*** | Select *Vacant* if the position has not been filled, or *Filled* if the position has a personnel member assigned to it.<br><br>*Note:* If you select *Filled,* the system displays additional fields for you to |

complete. Once a position is filled and a personnel member has been assigned, the position status can no longer be changed back to *Vacant*.

**Position Description***

Enter a description for the position. Maximum text is 500 characters, about 100 words.

*Note*: You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left.

**Find Personnel***

Enter the name of the personnel member, last name first. As you type, the system displays a drop-down list with the names of Personnel that have already been entered into the MIS for all programs. When you select the desired name from the list, the system uses existing information to complete some of the fields. Review the completed fields for accuracy and complete the remaining fields If the desired name is not displayed use the First Name, Middle Name, and Last Name fields to enter the personnel member's name.

You can click the *Reset Name & Details* link to clear the Personnel Details fields and start another search.

**Salutation***

Select the salutation for the personnel member, for example, Dr., Mr., Ms., etc.

*Note*: This field is displayed only if you selected *Filled* in the Position Status field.

**First Name***

Enter the first name of the personnel member. Maximum text is 50 characters, about 10 words.

*Note*: This field is displayed only if you selected *Filled* in the Position Status field. When adding a personnel member, this field is not editable. However, when editing a personnel member, this field is editable.

**Middle Name**

Enter the middle name of the personnel member. Maximum text is 50 characters, about 10 words.

*Note*: This field is displayed only if you selected *Filled* in the Position Status field. When adding a personnel member, this field is not editable. However, when editing a personnel member, this field is editable.

**Last Name***

Enter the last name of the personnel member. Maximum text is 50

characters, about 10 words.

*Note*: This field is displayed only if you selected *Filled* in the Position Status field. When adding a personnel member, this field is not editable. However, when editing a personnel member, this field is editable.

**Status***

Specify the status of the personnel member.

If the personnel member is active, select the *Active* option and enter the activation date in the field in mm/dd/yyyy format or select a date from the calendar.

If the personnel member is not active, select the *Inactive* option and enter the deactivation date in the field in mm/dd/yyyy format or select a date from the calendar.

**Telephone***

Enter the personnel member's primary telephone number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box.

Specify up to a five-digit extension number in the *ext*. field if available.

*Note*: This field is displayed only if you selected *Filled* in the Position Status field. When adding a personnel member, this field is not editable. However, when editing a personnel member, this field is editable.

**FAX**

Enter the personnel member's primary fax number by entering the first three digits in the first text box, next three digits in the second, and the last four digits in the third text box.

*Note*: This field is displayed only if you selected *Filled* in the Position Status field. When adding a personnel member, this field is not editable. However, when editing a personnel member, this field is editable.

**E-mail***

Enter the personnel member's contact E-mail address. The address must contain a name and domain, for example, jerryb@cdc.gov.

Maximum text is 100 characters, about 20 words.

*Note*: This field is displayed only if you selected *Filled* in the Position Status field. When adding a personnel member, this field is not editable. However, when editing a personnel member, this field is editable.

**Employment Type***

Select the employment type of the personnel member—Grantee or Contract Employee.

| | |
|---|---|
| | If the desired employment type is not included in the list, select *Other*, and enter the employment type in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.<br><br>*Note*: This field is displayed only if you selected *Filled* in the Position Status field. |
| **Employment Type*** | Select the employment type of the personnel member—Grantee or Contract Employee.<br><br>If the desired employment type is not included in the list, select *Other*, and enter the employment type in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.<br><br>*Note*: This field is displayed only if you selected *Filled* in the Position Status field. |
| **Personnel Member a Subject Matter Expert in*** | For each area of subject matter expertise listed, specify the percentage of time allocated to the specific area for the personnel member by selecting the check box for the area and entering the number in the % text box. For example 25 or 100. Enter whole numbers in this field. You cannot enter decimal points, for example, 25.5. If the personnel member is not a subject matter expert in any of the areas listed, select *Not Applicable*.<br><br>*Note*:<br>This field is displayed only if you selected *Filled* in the Position Status field.<br>This field is available only for the CCC DP-1205 FOA. |
| **Personnel Member Competencies*** | Specify the areas in which the individual is competent by selecting the check box for the area(s).<br><br>*Note*:<br>This field is displayed only if you selected *Filled* in the Position Status field.<br>This field is available only for the CCC DP-1205 FOA. |
| **Association to Action Plan - Activities** | This column displays the activities from the action plan that are assigned to the personnel member. You can click the activity link to open a pop-up window that displays the activity details. After viewing the activity details, click *Close* to close the pop-up window. |
| **Time Frame** | This column displays the time frame, i.e., starting quarter and year and ending quarter and year for the activity. |

| | |
|---|---|
| **Reassign** | If you want to reassign the activity to another active personnel member, select a different personnel member from the drop-down list. |
| **Save** | Click *Save* to save the information you entered and also upload attachments. The system saves the information and returns you to the Personnel summary page.<br><br>If any fields on the page are incomplete or invalid when you click *Save*, the system displays an error. Correct all invalid fields and click *Save* again.<br><br>*Note*: After you click *Save* on the Edit page, you also need to click *Yes* on the Edit Confirmation page. |
| **Cancel** | Click *Cancel* to discard any information entered and re-display the Personnel summary page. |
| **Back** | Click *Cancel* to discard any information entered and re-display the Personnel summary page. |

*= Required field.

### Delete Personnel

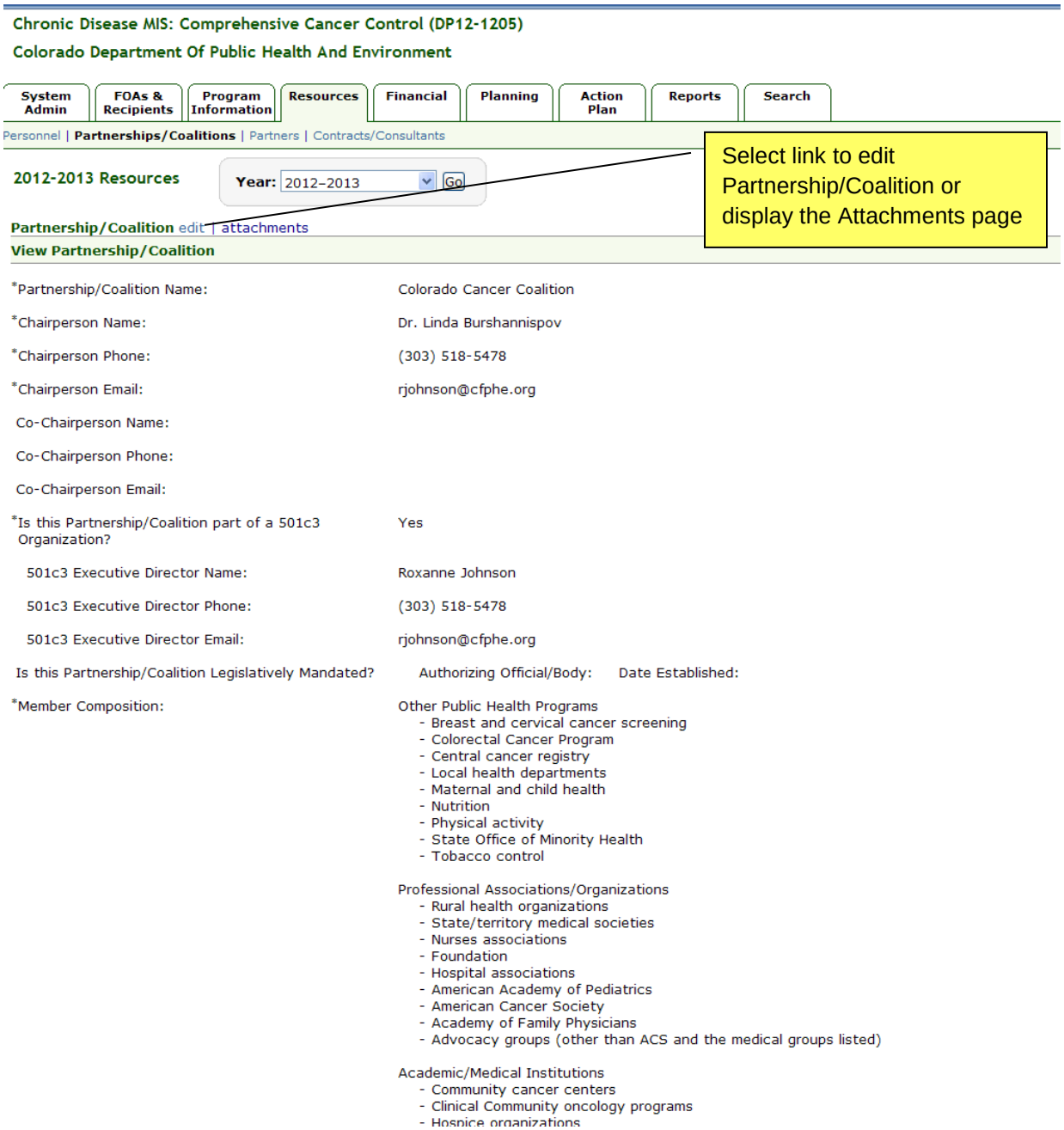
When deleting a personnel member, you will be asked to confirm your decision. Once a personnel member is deleted it is no longer available in the system. If a personnel member who is assigned to work plan activities is deleted, the personnel member will be also removed from the work plan activity.

## Partnerships/Coalition (Comprehensive Cancer Control (CCC-703, CCC-1205) FOA only)

The Partnerships/Coalition section is used by the CCC program to enter and maintain information about the partnerships and coalitions in your program. Coalitions are groups of stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project.

## View/Edit Partnership/Coalition Information

The view and edit Partnership Coalition pages contain the same fields. The 'View Partnership/Coalition' page displays the data in a 'read-only' format while the 'Edit' page allows modification of the existing data. The initial or default page for the Partnership/Coalition section is the 'View Partnership/Coalition' page. From the 'view' page, you are able to link to the 'edit' and the 'Attachments' pages.



## Partnership/Coalition – Edit page

Chronic Disease MIS: Comprehensive Cancer Control (DP12-1205)

Colorado Department Of Public Health And Environment

My Reports | Help | Log Out

System Admin | FOAs & Recipients | Program Information | Resources | Financial | Planning | Action Plan | Reports | Search

Personnel | **Partnerships/Coalitions** | Partners | Contracts/Consultants

**2012-2013 Resources** *Required

**Edit Partnership/Coalition** **Last Updated:** 09/26/2012

*Partnership/Coalition Name: Colorado Cancer Coalition

*Chairperson Name: Dr. Linda Burshannispov

*Chairperson Phone: 303 518 5478 ext.

*Chairperson Email: rjohnson@cfphe.org

Co-Chairperson Name:

Co-Chairperson Phone: ext.

Co-Chairperson Email:

*Is this Partnership/Coalition part of a 501c3 Organization? (•) Yes ( ) No

501c3 Executive Director Name: Roxanne Johnson

501c3 Executive Director Phone: 303 518 5478 ext.

5013c Executive Director Email: rjohnson@cfphe.org

*Is this Partnership/Coalition Legislatively Mandated? ( ) Yes Authorizing Official/Body: Date Established:
( ) No

*Member Composition:

CDC Chronic Disease Programs
- [ ] Colorectal Cancer Control Program
- [ ] Community Transformation Grant (CTG)
- [ ] Coordinated Chronic Disease Program
- [ ] Demonstrating Capacity to Implement Policy and Environmental Cancer Control Interventions
- [ ] Diabetes Prevention and Control Program
- [ ] National Breast and Cervical Cancer Early Detection Program (NBCCEDP)
- [ ] National Heart Disease and Stroke Prevention Program
- [ ] National Program of Cancer Registries (NPCR)
- [ ] National Tobacco Control Program
- [ ] Nutrition and Physical Activity Program to Prevent Obesity and other Chronic Disease
- [ ] REACH
- [ ] State Public Health Approaches to Improving Arthritis Outcomes
- [ ] WiseWoman
- [ ] Other (specify)
- [ ] Other (specify)
- [ ] Other (specify)

Other Public Health Programs
- [x] Breast and cervical cancer screening
- [x] Colorectal Cancer Program
- [ ] Environmental Health
- [ ] Immunization
- [ ] Local/Tribal health Departments
- [x] Maternal and child health
- [x] Nutrition
- [x] Physical activity
- [ ] SEER Cancer Registry
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction CCC
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Health Commissioners
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Health Departments
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Office of Minority Health
- [x] Tobacco control
- [ ] Urban Indian Health Centers
- [ ] Other (specify)

Other Government Entities
- [ ] Bureau of Indian Affairs
- [ ] City Planning and Land Use
- [ ] Department of Agriculture (e.g., Cooperative Extension Programs)
- [ ] Health Resources and Services Administration (HRSA)
- [ ] Human services agencies (specify)
- [ ] Indian Health Service
- [ ] Parks and Recreation
- [ ] Quality Improvement Organization for Medicare
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Education agencies
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Medicaid Agency
- [ ] Transportation Department
- [ ] Other (specify)

Professional Associations/Organizations
- [ ] American Academy of Family Physicians
- [x] American Academy of Pediatrics
- [x] American Cancer Society
- [ ] American College of Obstetrics and Gynecology
- [ ] American College of Physicians
- [ ] American College of Surgeons
- [ ] American Society of Clinical Oncology
- [ ] Association of American Indian Physicians
- [x] Foundation
- [x] Hospital associations
- [ ] Intercultural Cancer Council
- [x] Nurses associations
- [x] Rural health organizations
- [ ] State/Tribe/Territory/Pacific Island Jurisdiction Medical Societies/Associations
- [ ] Other (specify)

Academic/Medical Institutions
- [x] Clinical Community oncology programs
- [x] Community cancer centers
- [ ] Federally Qualified Health Centers (FQHC)
- [x] For-profit hospitals (that are not Cancer Centers)
- [ ] Historically Black Colleges and Universities
- [x] Hospice organizations
- [x] Individual physicians
- [ ] Major Health System Organizations (e.g., HMO, Regional Hospitals)
- [x] Medical Schools
- [ ] Minority Commissions
- [ ] NCI Designated Cancer Centers
- [x] Prevention Research Centers
- [ ] Primary Health Care Facilities
- [x] Schools of public health
- [ ] Tribal Colleges and Universities
- [ ] Other academic institutions
- [ ] Other(specify)

Business/Industry
- [ ] Corporations or Businesses
- [ ] Environmental Organizations
- [ ] Fitness/Health
- [ ] Food and Beverage Industry
- [ ] Health plans/insurance companies
- [ ] Pharmaceutical companies
- [ ] Other (specify)

Political Leaders
- [ ] Governor or staff
- [ ] Indigenous Leaders
- [ ] Legislators or staff
- [ ] Tribal Health administrators
- [ ] Tribal Leaders
- [ ] Other political leaders (mayors, city council, judges, etc.)
- [ ] Other (specify)

Community-Based Organizations
- [ ] Civic Organizations
- [ ] Community board members
- [x] Faith-based organizations
- [x] Minority organizations
- [x] Survivor Groups
- [ ] Other (specify)

Other
- [ ] Advisory Board
- [ ] All Tribes in the region
- [ ] Education (e.g., School Districts, After School Programs, Preschool)
- [ ] Individual Survivors
- [ ] Legal/Policy Experts
- [ ] Media
- [ ] Resource Centers
- [ ] Other (specify)
- [ ] Other (specify)
- [ ] Other (specify)

*Workgroups in Partnership/Coalition:

- [ ] Breast
- [ ] Cervical
- [ ] Colorectal
- [ ] Data and Surveillance
- [ ] Diagnosis/Treatment (Clinical Trials Survivorship)
- [ ] Diagnosis/Treatment (General)
- [ ] Evaluation
- [ ] Health Disparities
- [ ] Lung
- [ ] Primary Prevention: General
- [ ] Primary Prevention: Nutrition/Physical Activity/Obesity
- [ ] Primary Prevention: Tobacco
- [ ] Policy, System and Environmental Change Approaches
- [ ] Skin
- [ ] Survivorship
- [ ] Other (specify)

*Race, Ethnicity and Geographic Representation:

Racial Populations

- [ ] African American or Black
- [ ] American Indian or Alaskan Native
- [ ] Asian Indian
- [ ] Chinese
- [ ] Filipino
- [ ] Japanese
- [ ] Korean
- [ ] Vietnamese
- [ ] Other Asian (specify)
- [ ] Native Hawaiian or Other Pacific Islander
- [ ] Guamanian or Chamorro
- [ ] Samoan
- [ ] White
- [ ] Other (specify)

Ethnic Populations

- [ ] Hispanic or Latino
- [ ] Non-Hispanic or Latino

Geography

- [ ] Urban
- [ ] Rural
- [ ] Frontier

*Number of Organizations in Partnership/Coaltion: 50

*Number of Individuals in Partnership/Coaltion: 300

*Date of Last Partnership Assessment: 8/1/2010

| Association to Action Plan | Time Frame |
|---|---|
| No activities assigned. | |

Save Cancel

## Partnerships/Coalition Section Field Instructions:

# Partnerships/Coalition

Use the Partnership/Coalition section to enter and maintain information about the partnerships and coalitions in your program. Coalitions are groups of stakeholder organizations that are established to assist in the formulation of plans, guide project activities, and identify additional financial resources for this project.

The following actions can be performed in the Partnership/Coalition section:

- *Edit:* Click this link to edit information for an existing partnership/coalition.
- *Attachments*: Click the links in this column to add an attachment.

### View/Edit/Delete Partnership/Coalition Information

The pages for viewing information and modifying existing partnership/coalition information are identical. The only difference is that the page for viewing information is display only while the page for modifying information displays the information that already exists.

| Field/Section/Button | Instructions |
|---|---|
| **Partnership/Coalition Name*** | Enter the name of the coalition.<br>Maximum text is 200 characters, about 40 words. |
| **Chairperson Name*** | Enter the name of the chairperson for the coalition.<br>Maximum text is 200 characters, about 40 words. |
| **Chairperson Phone*** | Enter the chairperson's telephone number by entering the first three digits in the first text box, the next three digits in the second, and the last four digits in the third text box.<br>Specify a five-digit extension number in the *ext*. field if one has been assigned to the program. |
| **Chairperson E-mail*** | Enter the chairperson's contact E-mail address. The address must contain a name and domain, for example, jerryb@cdc.gov.<br>Maximum text is 100 characters, about 20 words. |

| | |
|---|---|
| **Co-Chairperson Name** | Enter the name of the co-chairperson for the coalition.<br><br>Maximum text is 200 characters, about 40 words. |
| **Co-Chairperson Phone** | Enter the co-chairperson's telephone number by entering the first three digits in the first text box, the next three digits in the second, and the last four digits in the third text box.<br><br>Specify a five-digit extension number in the *ext*. field if one has been assigned to the program. |
| **Co-Chairperson E-mail** | Enter the co-chairperson's contact E-mail address. The address must contain a name and domain, for example, jerryb@cdc.gov.<br><br>Maximum text is 100 characters, about 20 words. |
| **Is this Partnership/Coalition part of a 501c3 Organization*** | Indicate by selecting *Yes* or *No* if this coalition is designated a 501c3 organization. |
| **501c3 Executive Director Name** | If the organization is 501c3, enter the name of the organization's executive director.<br><br>Maximum text is 200 characters, about 40 words. |
| **501c3 Executive Director Phone** | If the organization is 501c3, enter the executive director's telephone number by entering the first three digits in the first text box, the next three digits in the second, and the last four digits in the third text box.<br><br>Specify a five-digit extension number in the *ext*. field if one has been assigned to the program. |
| **501c3 Executive Director E-mail** | If the organization is 501c3, enter the executive director's contact E-mail address. The address must contain a name and domain, for example, jerryb@cdc.gov.<br><br>Maximum text is 100 characters, about 20 words. |
| **Is this Partnership/Coalition legislatively mandated?** | Indicate by selecting Yes or No if the Partnership/Coalition is mandated by a legislative act.<br><br>If the Partnership/Coalition is legislatively mandated, enter the name of the |

| | |
|---|---|
| | authorizing official or body in the Authorizing Official/Body text box or select a date from the calendar.<br><br>Maximum text for the Authorizing Official/Body field is 200 characters, about 40 words.<br><br>If the Partnership/Coalition is legislatively mandated, enter the date that it was established in the Date Established text box in mm/dd/yyyy format or select a date from the calendar |
| **Member Composition*** | For each composition section, Public Health Programs, Other Government Agencies, Professional Associations/Organizations, etc., select all that apply. |
| **Race, Ethnicity and Geographic Representation*** | For each section, Racial Populations, Ethnic Populations, Geography, select all that apply. |
| **Regional Representation*** | In the Number of Regions text box, enter the number of regions represented.<br><br>Maximum text is 10 characters.<br><br>In the Number of Regions with Member Organization Located in Region text box, enter the number of regions that actually have member organizations present in the region.<br><br>Maximum text is 10 characters. |
| **Workgroups in Partnership/Coalition*** | Select the workgroups represented in the partnership/coalition.<br><br>If the desired workgroup is not listed in the list, select *Other* and enter the type of workgroup in the *Other* text box.<br><br>Maximum text for the *Other* field is 50 characters, about 10 words. |
| **Number of Organizations in Partnership/Coalition*** | Enter the number of organizations that exist in the partnership/coalition in the text box.<br><br>Maximum text is 10 characters. |
| **Number of Individuals in Partnership/Coalition*** | Enter the number of individuals in the partnership/coalition in the text box.<br><br>Maximum text is 500 characters, about 100 words. |

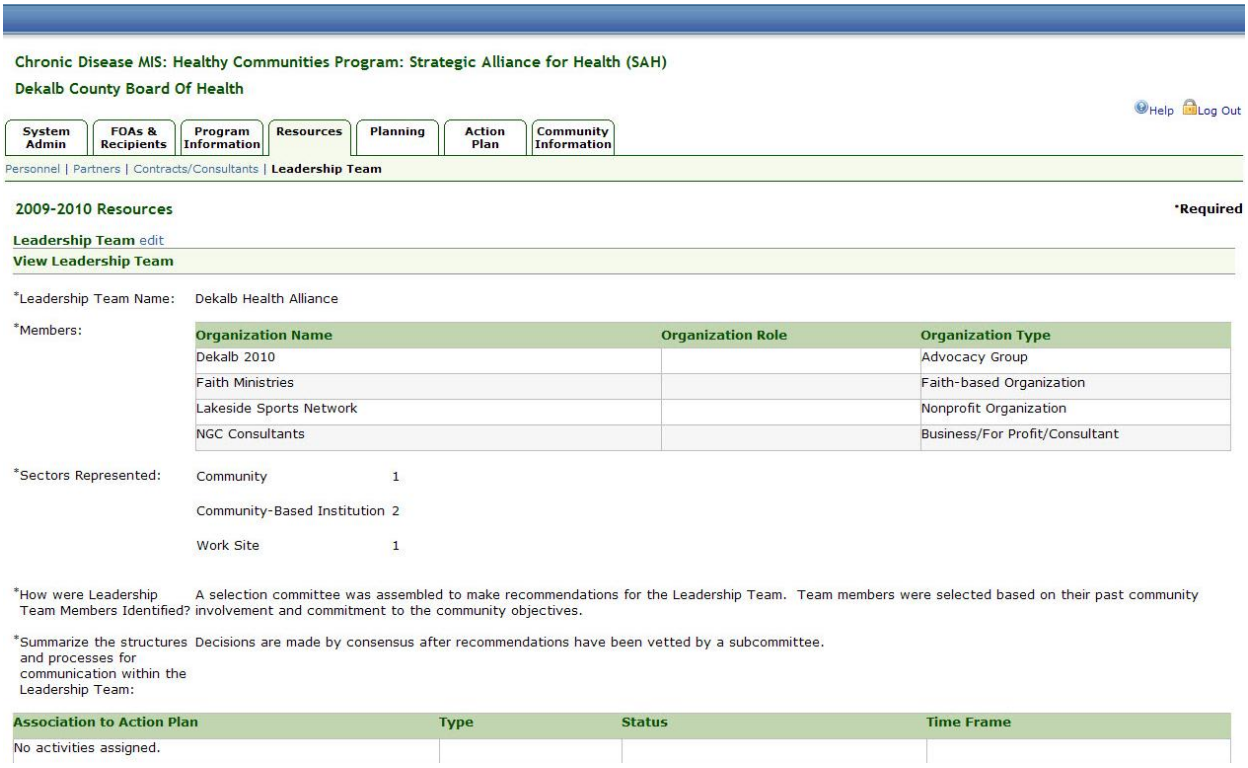
| | |
|---|---|
| **Date of Last Assessment*** | Enter the date that the last assessment was performed. Be sure to enter the date as numbers in the following format: MM/DD/YYYY. For example, 10/08/2009. You can also click the calendar graphic to select a date from the calendar. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Partnership/Coalitions page. |

*= Required field.

# Leadership Team (Strategic Alliance for Health & CTG FOAs only)

Leader Team section is used to maintain information on the members of the leadership team.

## Leadership Team View Page



Chronic Disease MIS: Healthy Communities Program: Strategic Alliance for Health (SAH)

Dekalb County Board Of Health

Help Log Out

System Admin | FOAs & Recipients | Program Information | Resources | Planning | Action Plan | Community Information

Personnel | Partners | Contracts/Consultants | **Leadership Team**

**2009-2010 Resources** *Required

**Leadership Team** edit

**View Leadership Team**

*Leadership Team Name: Dekalb Health Alliance

*Members:

| Organization Name | Organization Role | Organization Type |
|---|---|---|
| Dekalb 2010 | | Advocacy Group |
| Faith Ministries | | Faith-based Organization |
| Lakeside Sports Network | | Nonprofit Organization |
| NGC Consultants | | Business/For Profit/Consultant |

*Sectors Represented:

| | |
|---|---|
| Community | 1 |
| Community-Based Institution | 2 |
| Work Site | 1 |

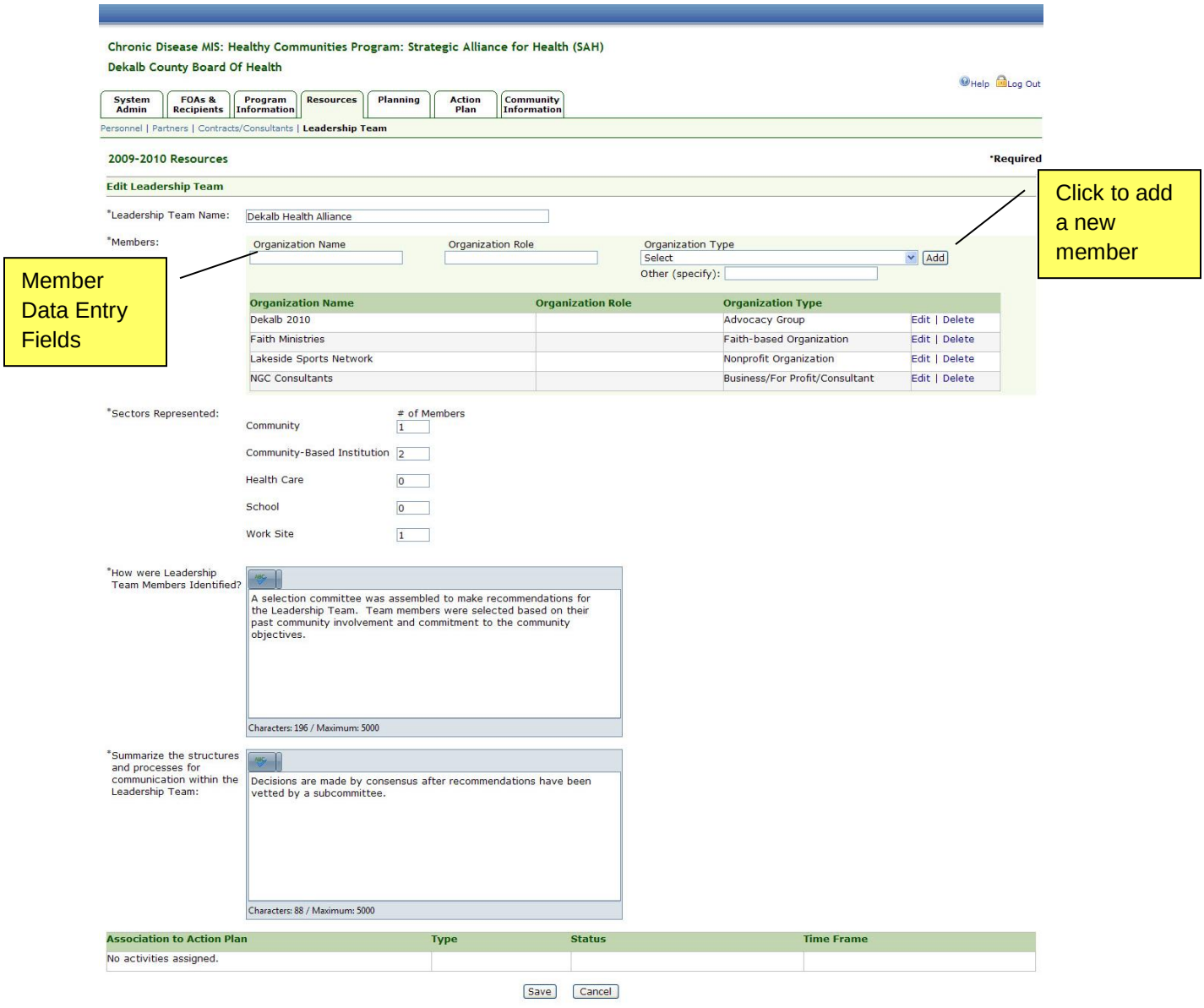
*How were Leadership Team Members Identified? A selection committee was assembled to make recommendations for the Leadership Team. Team members were selected based on their past community involvement and commitment to the community objectives.

*Summarize the structures and processes for communication within the Leadership Team: Decisions are made by consensus after recommendations have been vetted by a subcommittee.

| Association to Action Plan | Type | Status | Time Frame |
|---|---|---|---|
| No activities assigned. | | | |

## Edit Leadership Team

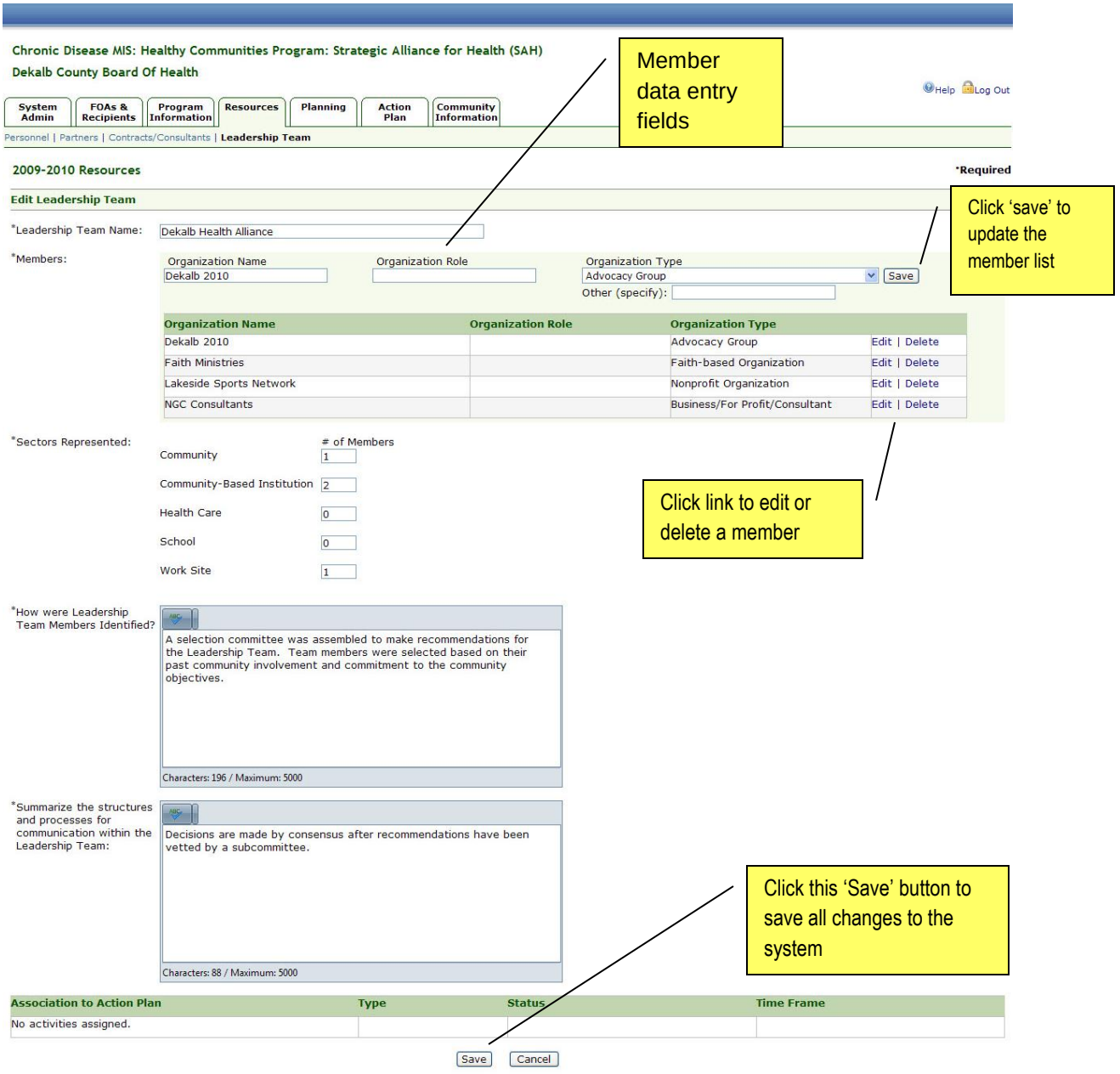
- Select the 'Edit' link from the View Leadership Team page
- On the Edit Leadership Team page, enter new information in the fields or select new list option.
- To add a new member, enter the member information in the member data entry fields and click 'Add' button. The member table will be updated to display the new member.



- To edit or delete  a Leadership Team member:
    - Click on the applicable link for the member.  The member's information will be displayed in the member data entry fields.
    - Enter the new information and click the 'Save' button to the right of the data entry fields.  The member list will be updated with the new information.
    - If deleting a member, a confirmation message will be displayed. Select 'Yes' option to delete member. The member list will be updated to show the deleted member was removed from the list.

Note

***You must click the 'save' button at the end of the page to save the member information in the system.***



## Leadership Team Field Instructions

| Field/Section/Button | Instructions |
|---|---|
| **Leadership Team Name*** | Enter the name of the leadership team.<br><br>Maximum is 200 characters, about 40 words. |
| **Representative Name*** | Enter the first and last name of the representative to add to the leadership team.<br><br>Maximum is 200 characters, about 40 words. |
| **Organization Name*** | Enter the organization associated with the representative.<br><br>Maximum is 200 characters, about 40 words. |
| **Organization Type*** | Select the organization type associated with the representative from the drop-down list.<br><br>If the desired partner type is not in included in the list, select *Other*, and enter the partner type in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words. |
| **Coach?*** | Indicate by selecting *Yes* or *No* whether the representative is a coach or not. |
| **Save*** | Click *Save* to save the representative information you entered. The system saves the information and displays the newly added representative in the members list.<br><br>If any fields in the Members section are incomplete or invalid then the system displays an error. Correct all errors and click *Save* again. |
| ***Edit**** | Click this link to edit existing leadership team member information. |
| ***Delete**** | Click this link to delete existing leadership team member information.<br><br>When deleting a leadership team member, you will be asked to confirm your decision. Once a member is deleted, the member is no longer available in the system. |

| | |
|---|---|
| **Setting/Sectors Represented*** | For each sector listed, enter the number of members into the corresponding #of Members text box. |
| **How were Leadership Team Members Identified?*** | Enter a description of how members were identified for the leadership team.<br><br>Maximum number for this field is 5000 characters, about 1000 words.<br><br>*Note*: You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left. |
| **What decision making process was developed by the Leadership Team and how has this process changed over the program*** | Enter a description of the decision making process that was developed by the leadership team and how the process has impacted and changed the program.<br><br>Maximum number for this field is 5000 characters, about 1000 words.<br><br>*Note*: You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left. |
| **Association to Action Plan*** | This section displays a list of all action plan 5 Year Outcome Objective and Annual Outcome Objective titles for the current budget year which are associated to this leadership team. The title of the objective and its status and time frame are displayed. This section is view only and cannot be modified.<br><br>You can click on the associated activity title to open the activity in a new window.<br><br>If the leadership team is not associated to any 5 Year Outcome Objectives and Annual Outcome Objectives, the system displays the following text: "No activities assigned." |
| **Save** | Click *Save* to save the information you entered. The system saves the information and returns you to the Leadership Team summary page.<br><br>If any fields on the page are incomplete or invalid when, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Leadership Team Summary page. |

# Partners

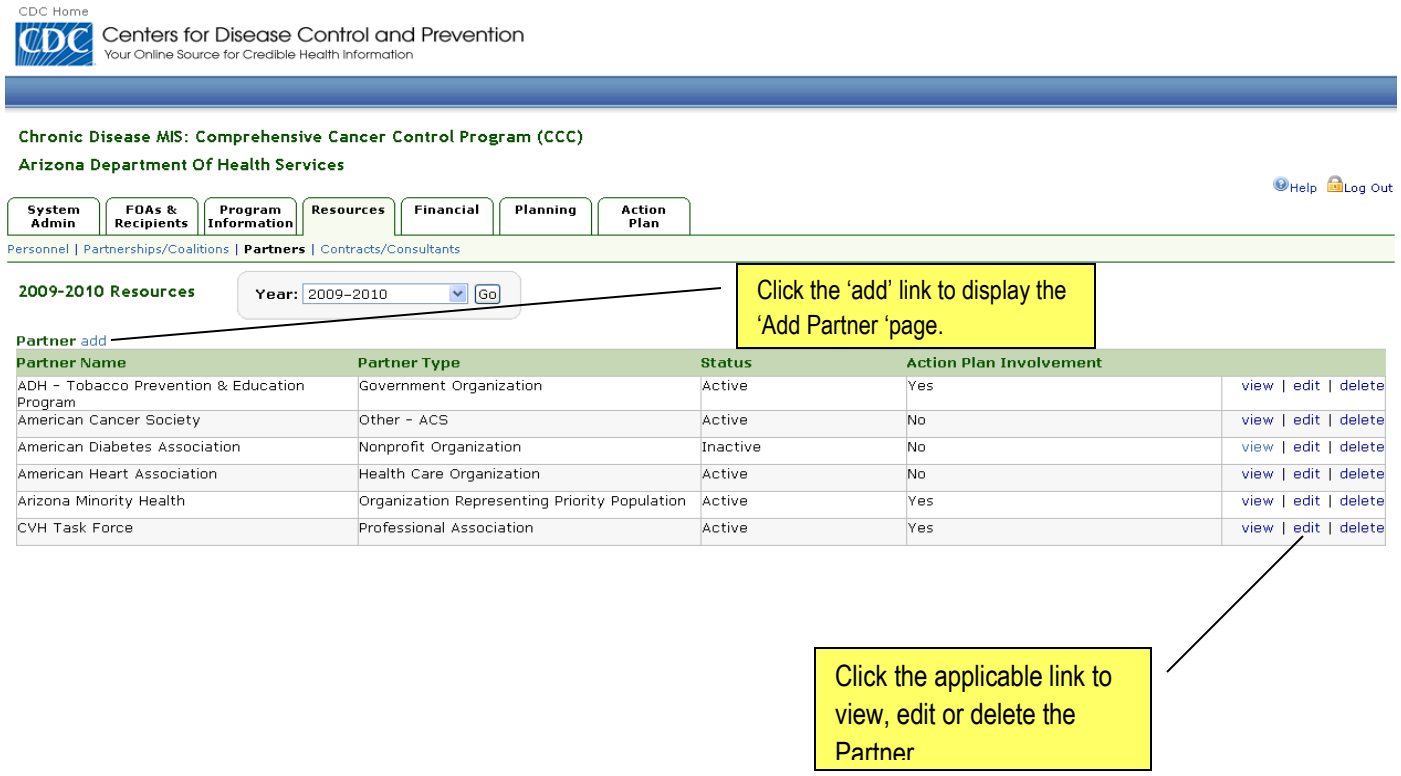
Use the Partners section to enter and maintain information about organizations or persons that collaborate with the recipient to accomplish program work.

The following actions can be performed in the Partners section:

- *Add:* Click this link to add a new partner.
- *View:* Click this link to view partner information.
- *Edit:* Click this link to edit information for an existing partner.
- *Delete:* Click this link to remove a partner. Any partner deleted from this section will also be deleted from any assigned action plan activities for the current budget year.

**Note** In order to maintain a history of partner information, it is recommended that partners are not deleted. Instead, the partner's status can be changed to 'Inactive' in the "Status" field. If a partner is entered by mistake, it is appropriate to delete the partner.

## Partner List Page



## View Partner

- All information displayed is read-only
- Use the 'Back' button to return to the Partner List page.

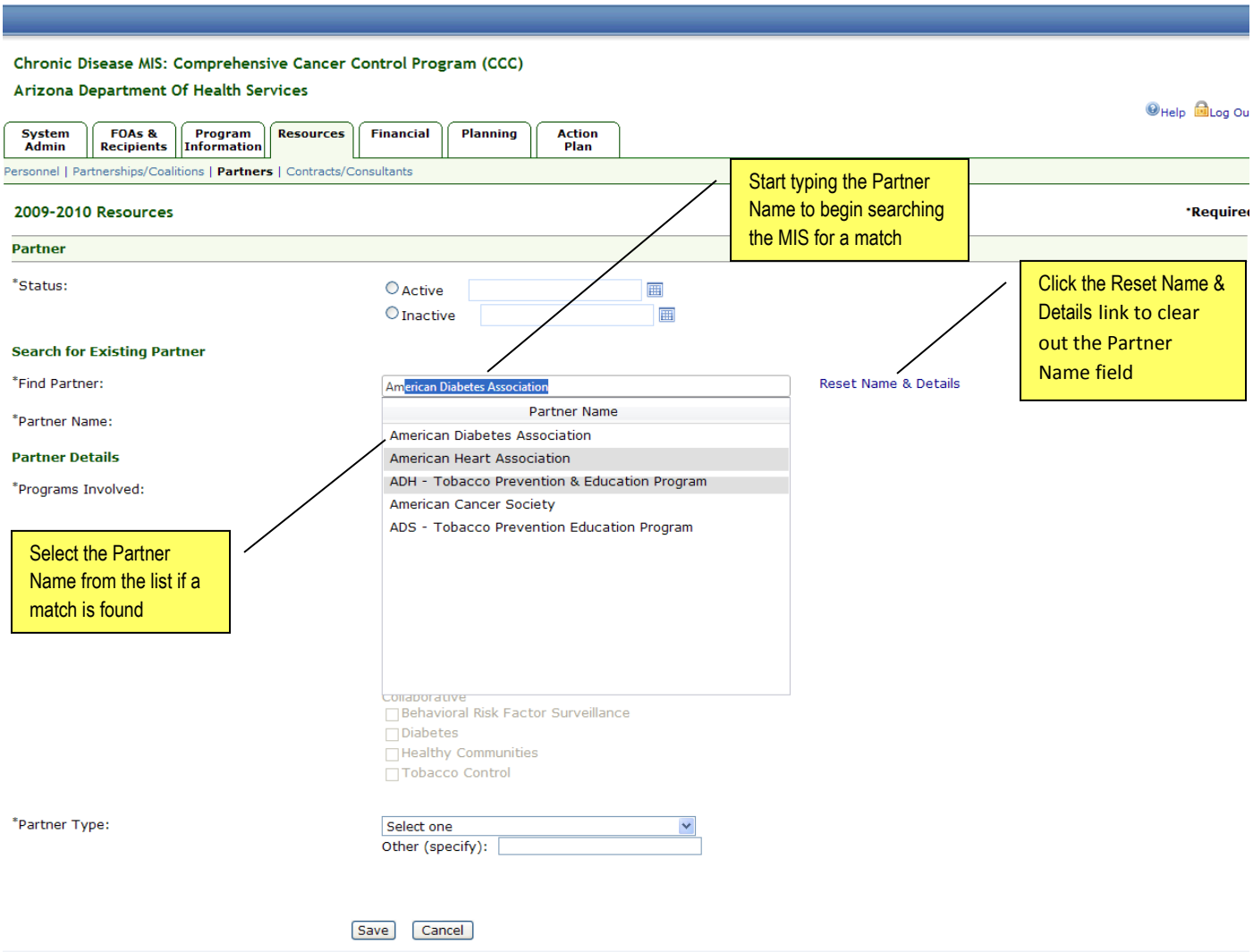
## Add/Edit Partner Information

The Add and Edit Partner pages contain the same fields. When adding a new partner, the fields are all empty or contain default data. When editing information, the selected partner's information is displayed for edit.

### To add a partner:

1. Select the Partner Status and the corresponding 'active' or 'inactive' date.
2. In the 'Find Partner' field, begin typing the partner's name. The system will immediately display all partners names in the MIS matching the letters typed. As more letters are typed, the list will get smaller.
3. If the partner name appears in the search list, click it to populate the 'partner name' field.
4. If you later decide that the partner selected is incorrect, click on the 'Reset name & Details' link to clear the Partner Name field and start a new search.
5. If the partner was not found in the MIS, a message indicating that a match was not found will be displayed in the 'Find Partner' field. Enter the Partner Name in the Partner Details section and complete the remaining fields to add the partner.
6. Click the 'Save' button.

## Add Partner page

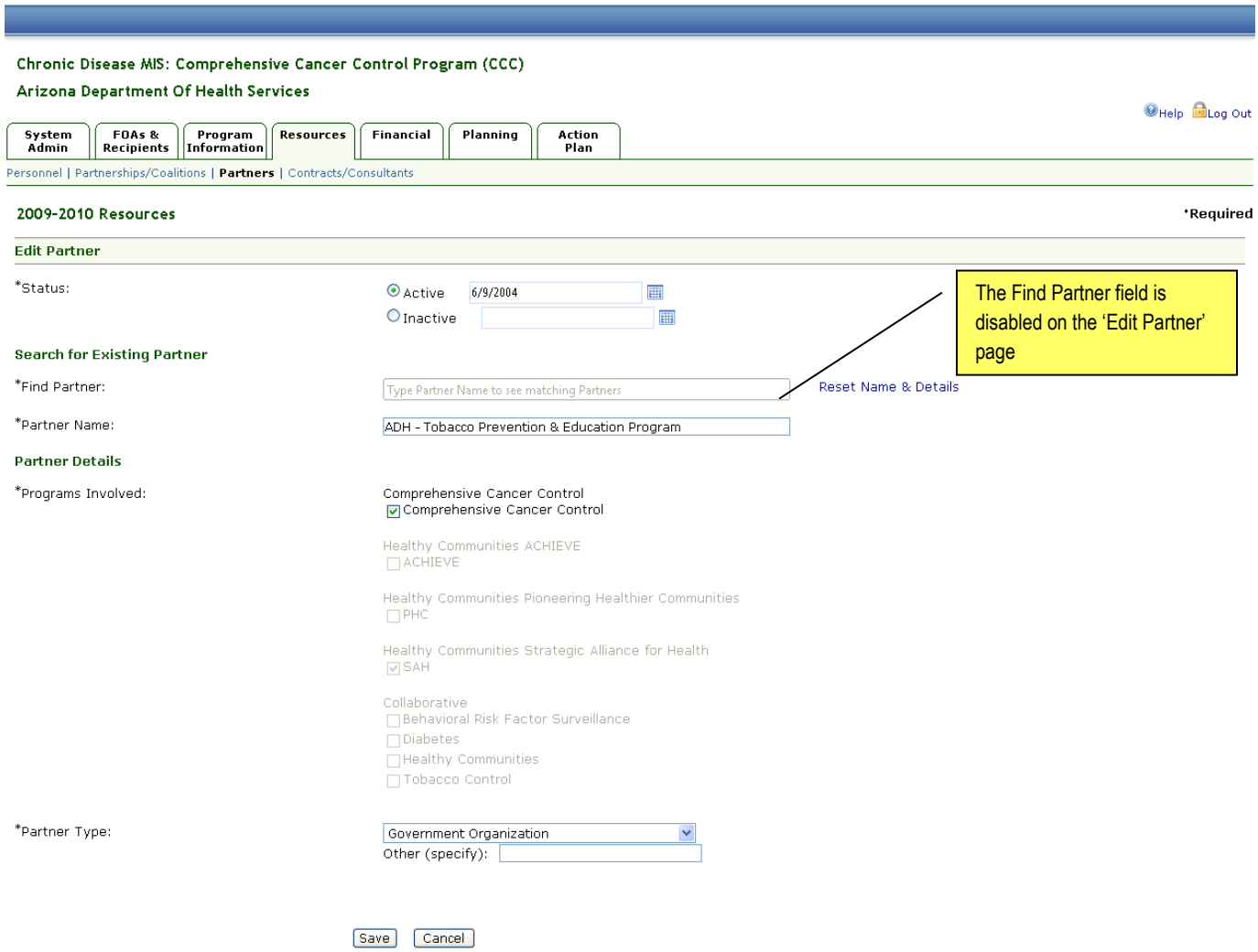


## Edit Partner:

1. Type over existing data in text fields or select options from check box or drop down lists.
2. Click the 'Save' button to save your changes.

Note: The Search for existing Partner field is grayed out since the member to be edited is already displayed

### Edit Partner page

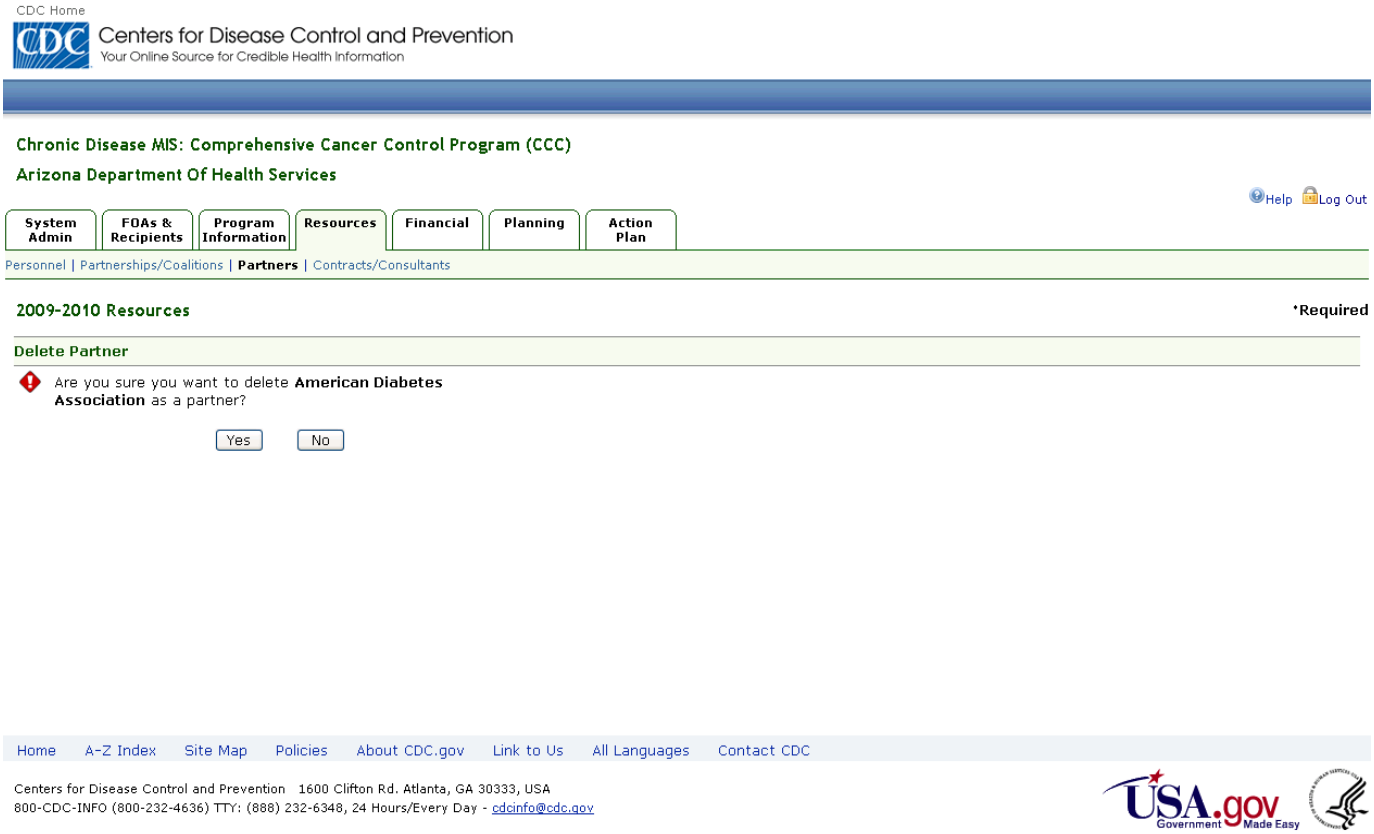


## Delete Partner Information

When deleting a partner, you will be asked to confirm your decision. Once a partner is deleted it is no longer available in the system. If a partner who is assigned to action plan activities is deleted, they will be removed from that Action Plan activity as well.

**Note** In order to maintain a history of partner information, it is recommended that partners are not deleted, instead, edit the partner and change the Partner Status to Inactive. If a partner was entered in error, it is appropriate to delete the partner.

### Delete Partner page



## Partner Information Fields

| Field/Section/Button | Instructions |
|---|---|
| **Status*** | Indicate the status of the partner by selecting *Active* or *Inactive*. After selecting a status, enter the date that the status became effective. Be sure to enter the date as numbers in the following format: MM/DD/YYYY. For example, 10/08/2009. You can also click the calendar graphic to select a date from the calendar. |
| **Find Partner*** | Enter the name of the partner. As you type, the system displays a drop-down list with the names of partners that have already been entered into the MIS for all programs. When you select the desired name from the list, the system auto-populates the Partner Name field. If the desired name is not displayed, use the Partner Name field to enter the partner's name.<br><br>You can click the *Reset Name & Details* link to clear the Search fields and start another search. |
| **Partner Name*** | Enter the name of the partner organization.<br><br>Maximum is 50 characters, about 10 words. |
| **Programs Involved*** | Select the check box for the programs associated with the partnership. |
| **Partner Type*** | Select the type of partner from the drop-down list.<br><br>If the desired partner type is not included in the list, select *Other*, and enter the partner type in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words. |
| **Partner Role*** | Select the role of the partner from the drop-down list.<br><br>If the desired partner type is not included in the list, select *Other*, and enter the partner role in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.<br><br>*Note*: This field is displayed only for the CCC Policy DP-1017 and CCC 1205 FOAs. |
| **Partner Agreement/MOU/MOA** | Click *Browse* to navigate to the location where the document is saved, and select the document.<br><br>To edit an attached file, edit the copy of the file on your computer, delete |

| | |
|---|---|
| | the attached file, and then upload it again. You can attach only one file, attaching a second file will overwrite the existing file.<br><br>*Note*: This field is displayed only for the CCC Policy DP-1017 and CCC DP-1205 FOAs. |
| **Association to Action Plan - Activities** | This column displays the activities from the action plan that are assigned to the partner. You can click the activity link to open a pop-up window that displays the activity details. After viewing the activity details, click *Close* to close the pop-up window. |
| **Time Frame** | This column displays the time frame, i.e., starting quarter and year and ending quarter and year for the activity. |
| **Reassign** | If you want to reassign the activity to another active partner, select a different partner from the drop-down list.<br><br>*Note*: To remove the partner from the activity, select Remove from Activity. |
| **Save** | Click *Save* to save the information you entered. The system saves the information and returns you to the Partners summary page.<br><br>If any fields on the page are incomplete or invalid when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Partners list page. |
| **Back** | Click *Back* to return to the Partners list page.<br><br>*Note:* This button is available only when viewing Partner information. |

*= Required field.

### Delete Partner Information

When deleting a partner, you will be asked to confirm your decision. Once a partner is deleted it is no longer available in the system. If a partner who is assigned to action plan activities is deleted, they will be removed from that work plan activity as well.

> *Note:* In order to maintain a history of partner information, it is recommended that partners are not deleted, but a partner's status can be changed to Inactive in the "Partner Status" field. However, if a partner is entered by mistake, it is appropriate to delete the partner.

## Contracts/Consultants

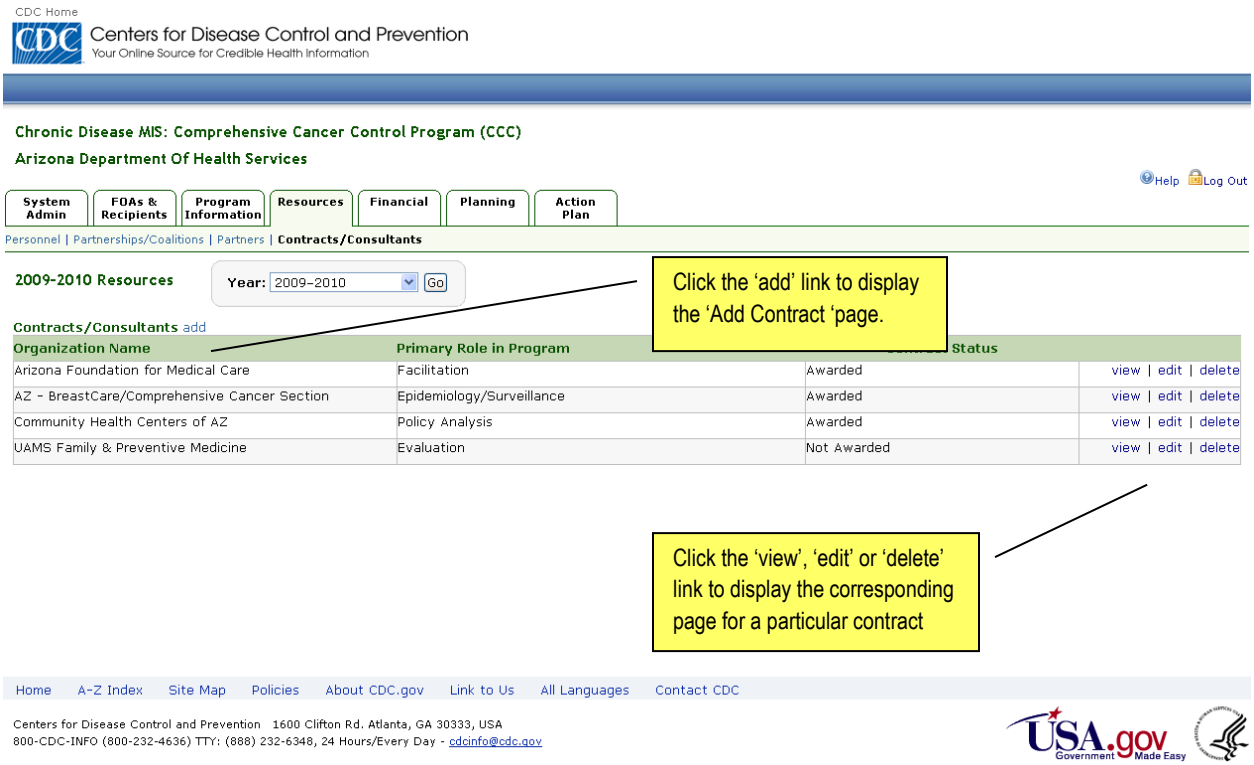
Use the Contracts/Consultants section to enter and maintain information about the contracts and consultants for your program. Contracts and consultants are individuals or organizations that receive funds in exchange for program specific work.

The following actions can be performed in the Contracts/Consultants section:

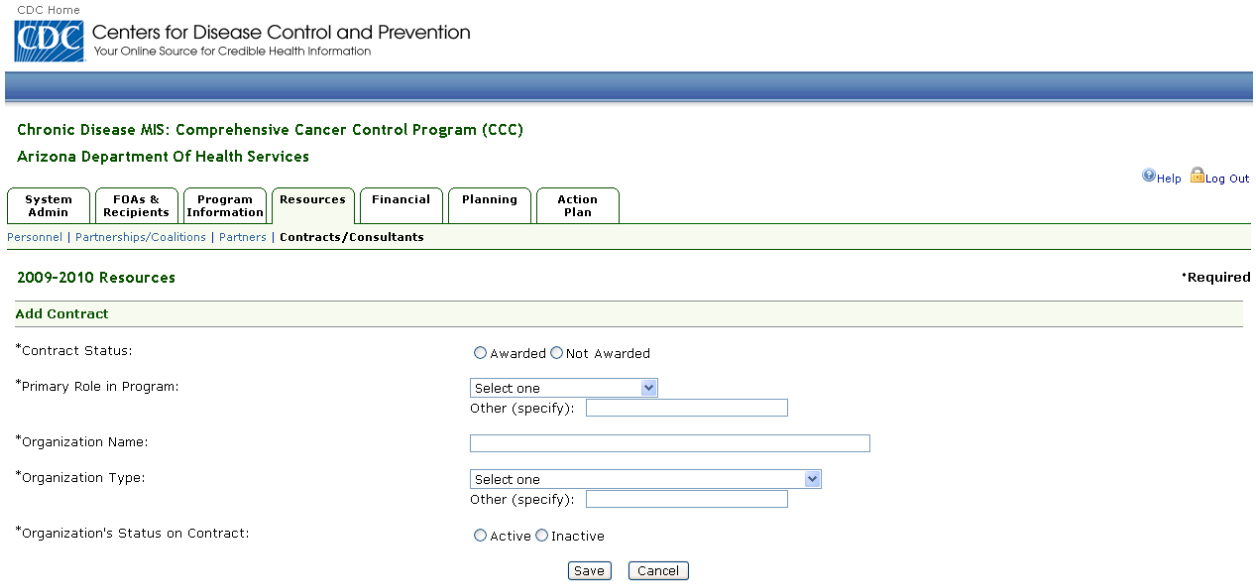
- *Add:* Click this link to add a new contract/consultant.
- *View:* Click this link to view contract/consultant information.
- *Edit:* Click this link to edit information for an existing contract/consultant.
- *Delete:* Click this link to remove a contract/consultant. Any contract/consultant deleted from this section will also be deleted from any assigned action plan activities for the current budget year.

  *Note:* In order to maintain a history of contract/consultant information, It is recommended that contracts/consultants are not deleted. If a contract/consultant is entered by mistake, it is appropriate to delete the information.

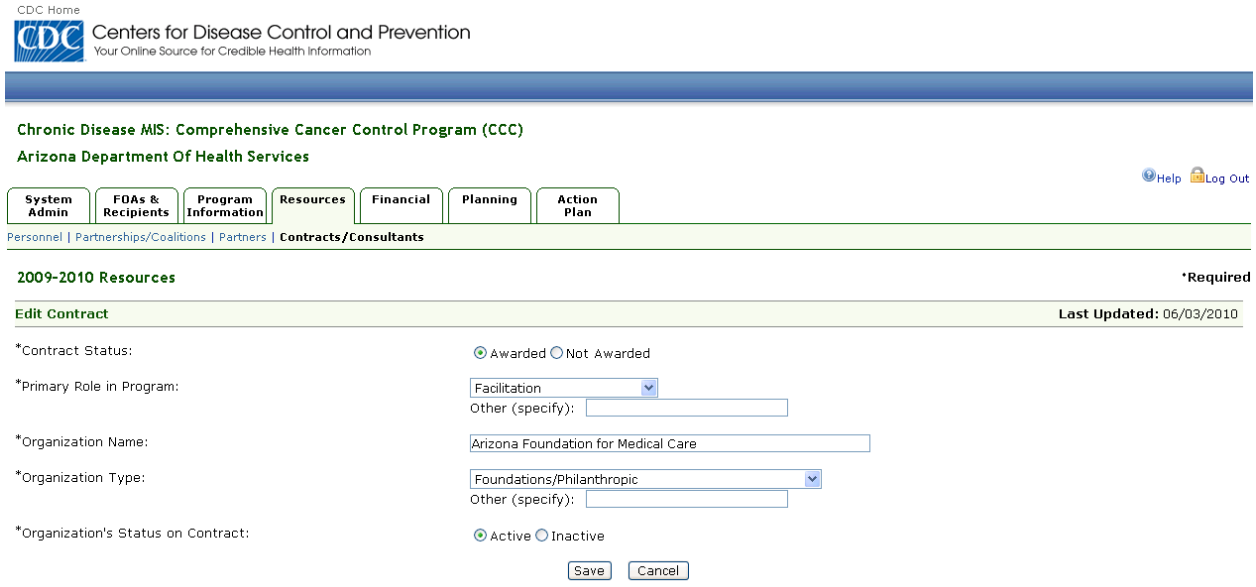
## Contract/Consultant Information – List Page



## Add Contract/Consultant




## Edit Contract/Consultant



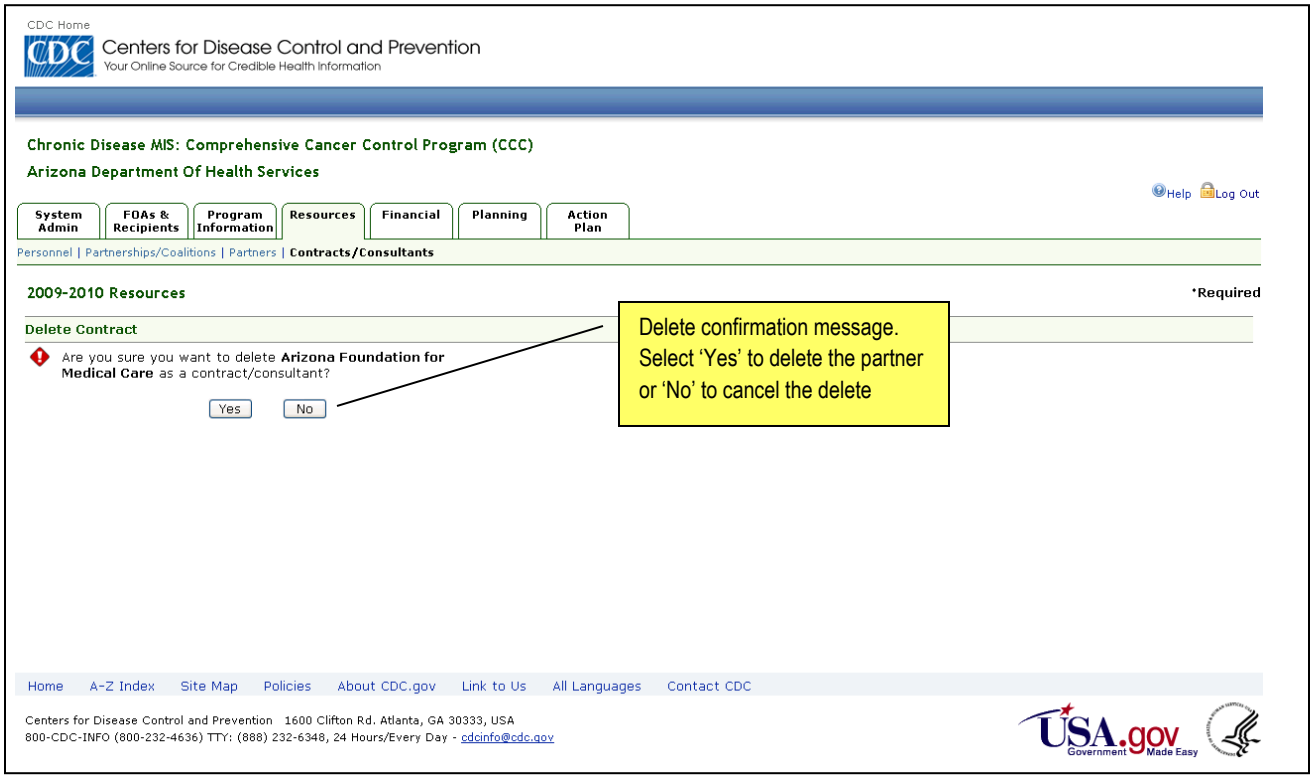
## Delete Contract/Consultant Information

When deleting a contractor, you will be asked to confirm your decision. Once a contractor is deleted it is no longer available in the system. If a contractor who is assigned to action plan activities is deleted, the contractor will be removed from that action plan activity as well.

Note

*Note:* In order to maintain a history of contract/consultant information, it is recommended that contracts/consultants not be deleted. If a contract/consultant is no longer working with the program, the 'Organization's Status on Contract' field should be set to 'Inactive. If a contract/consultant is entered by mistake, it is appropriate to delete the information.

### Delete Contract page



| Field/Section/Button | Instructions |
|---|---|
| **Contract Status*** | Select *Awarded* or *Not Awarded* to indicate if the contract has been awarded or not. |
| **Primary Role in Program*** | Select the primary role that the contractor performs in your program from the drop-down list.<br><br>If the desired role is not in included in the list, select *Other*, and enter the role in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words. |
| **Organization Name*** | Enter the name of the organization. If the contractor is an individual, enter the first and last name.<br><br>Maximum text is 200 characters, about 40 words. |
| **Organization Type*** | Select the type of organization from the drop-down list.<br><br>If the desired organization type is not in included in the list, select *Other*, and enter the organization type in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words. |
| **Organization's Status on Contract*** | Select *Active* or *Inactive* to indicate if the organization is active or inactive on the contract. |
| **Is contract funded by this FOA?*** | Indicate by selecting *Yes* or *No* if the specific contract is funded by this FOA.<br><br>*Note:* This field is available to only Collaborative, CCC, and CCC PD-1205 FOAs. |
| **Describe the funding source and amount*** | If the contract is funded by this FOA and you selected *Yes* in the "Is contract funded by this FOA?" field, describe the funding source and enter the funding amount.<br><br>Maximum text is 500 characters, about 100 words.<br><br>*Note*: This field is available to only Collaborative, CCC, and CCC PD-1205 FOAs. |
| **Contract/Consultant is a** | For each area of subject matter expertise listed, specify the percentage of time allocated to the specific area for the |

| | |
|---|---|
| **subject matter expert in*** | contract/consultant by selecting the check box for the area and entering the number in the % text box. For example 25 or 100. Enter whole numbers in this field. You cannot enter decimal points, for example, 25.5. If the contract/consultant is not a subject matter expert in any of the areas listed, select *Not Applicable*.<br><br>*Note*:<br>This field is displayed only if you selected *Filled* in the Position Status field.<br>This field is available only for the CCC DP-1205 FOA. |
| **Association to Action Plan - Activities** | This column displays the activities from the action plan that are assigned to the contract. You can click the activity link to open a pop-up window that displays the activity details. After viewing the activity details, click *Close* to close the pop-up window. |
| **Time Frame** | This column displays the time frame, i.e., starting quarter and year and ending quarter and year for the activity. |
| **Reassign** | If you want to reassign the activity to another active contract, select a different contract from the drop-down list.<br><br>*Note*: To remove the contract from the activity, select Remove from Activity. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and re-display the Contracts/Consultants list page. |
| **Back** | Click *Back* to return to the List Contracts/Consultants list page.<br><br>*Note:* This button is available only when viewing Contract/Consultant information. |

# Financial Tab (Comprehensive Cancer control (CCC) FOAs Only)

**Introduction:** The Financial tab contains the following sections:

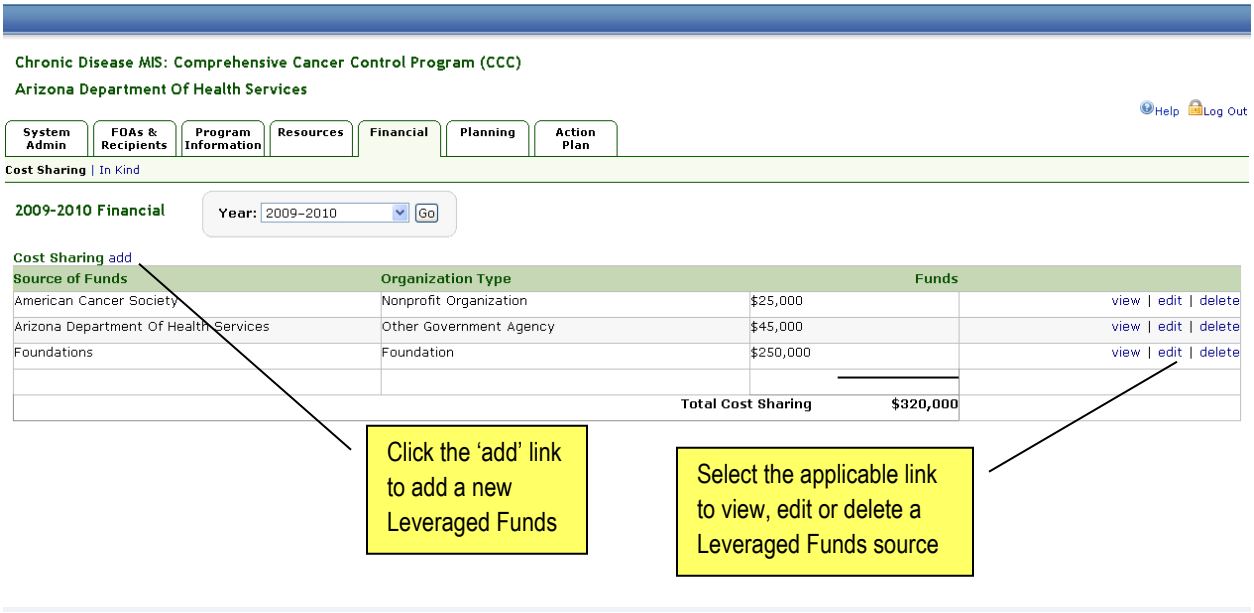
- **Leveraged Funds** – The Leveraged Funds section is used to maintain information relating to the organizations participating in Leveraged Funds.

  .
- **In-Kind –** maintain details on in-kind contributions

## Leveraged Funds

### Leveraged Funds List page

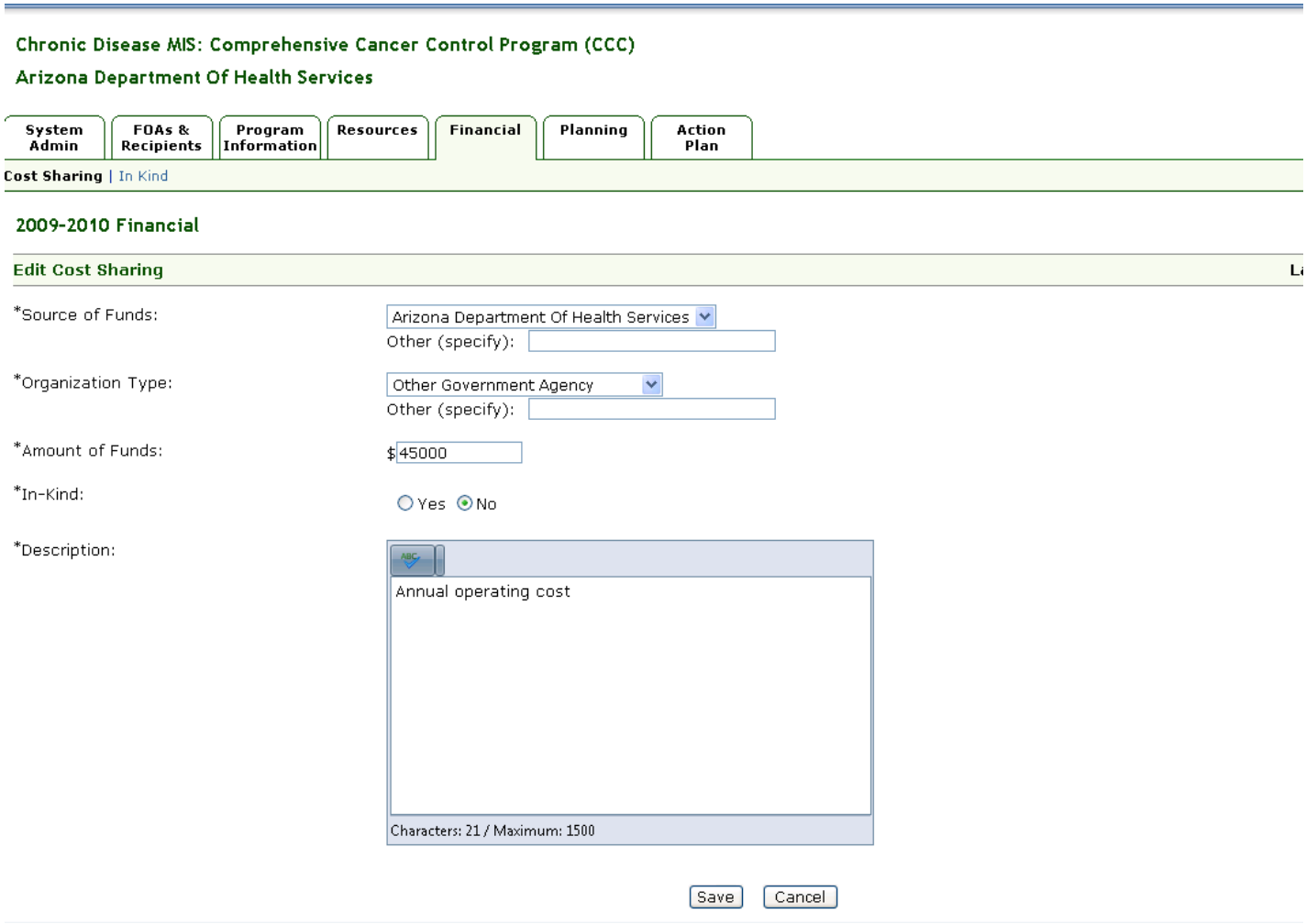
The Leveraged Funds List page displays summary level information of the organizations participating in Leveraged Funds and their contribution amount. From the List page, you are able to add new Leveraged Funds or view, edit or delete existing Leveraged Funds sources.



## Add/Edit Leveraged Funds Information

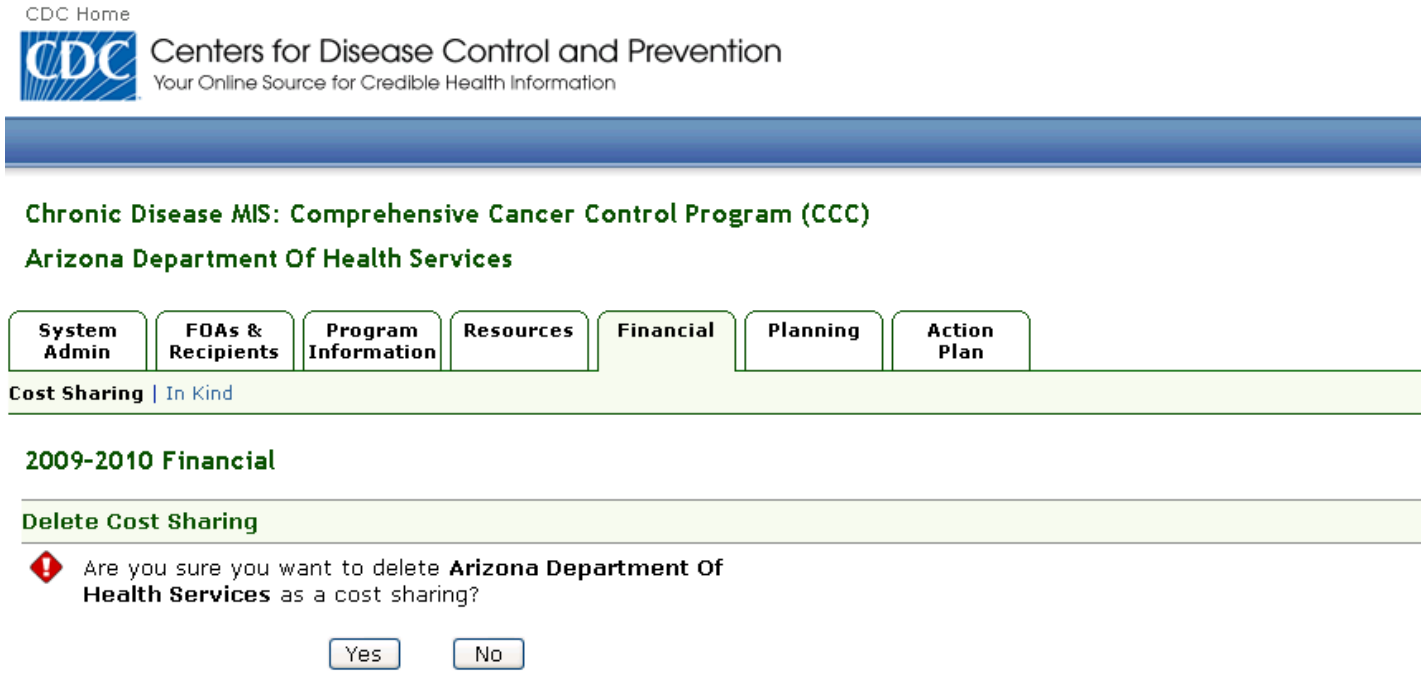
The pages for adding new Leveraged Funds information and editing existing Leveraged Funds information contain the same fields.

- To add a new Leveraged Funds source, select the appropriate options from the drop down list or enter information in the text fields.
- To edit Leveraged Funds information, select new list options or replace the information in the text fields.



## Delete Leveraged Funds

When deleting a Leveraged Funds entry, you will be asked to confirm your decision. Once Leveraged Funds information is deleted, it is no longer available in the system.

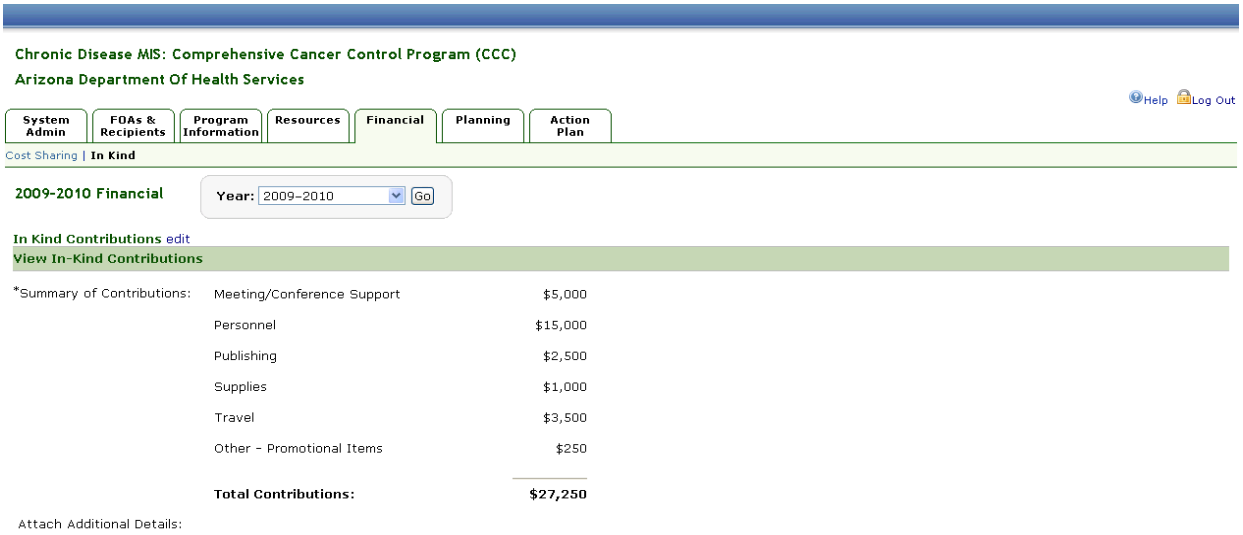


## Leveraged Funds Field Instructions:

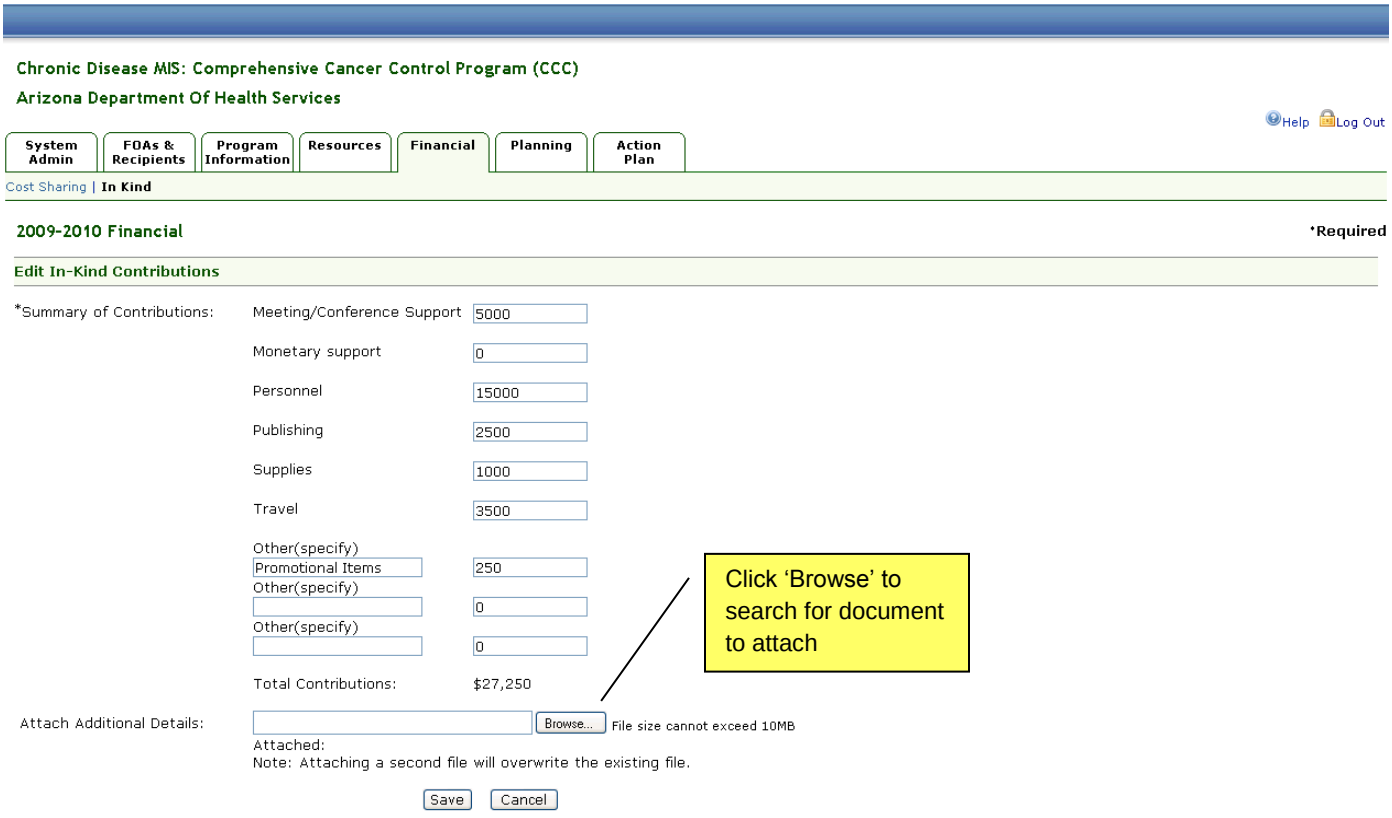
| Field/Section/Button | Instructions |
|---|---|
| **Source of Funds*** | Select the source of funds from the drop-down list.<br><br>If the desired source of funds is not in included in the drop-down list, select *Other*, and enter the source of funds in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words. |
| **Organization Type*** | Select the organization type from the drop-down list.<br><br>If the desired organization type is not in included in the drop-down list, select *Other*, and enter the organization type in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words. |
| **Amount of Funds*** | Enter the amount of the Leveraged Funds. Do not include decimal points.<br><br>Maximum number for this field is 12 digits.<br><br>*Note:* The amount entered in this field must be higher than zero (0). |
| **Description*** | Enter a description for the Leveraged Funds item.<br><br>Maximum number for this field is 1500 characters, about 300 words.<br><br>*Note*: You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left. |
| **Save** | Click *Save* to save the information you entered and return to the List Leveraged Funds page.<br><br>If any fields on the page are incomplete or invalid when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the List Leveraged Funds page. |
| **Back** | Click *Back* to return to the List Leveraged Funds page. |

# In Kind Contributions (Comprehensive Cancer Control (CCC) FOAs only)

The In-Kind Contributions list page lists all contributions that were made In-Kind to the program and a total amount for the contributions.




## Add/Edit In-Kind Contributions



## In-Kind Contributions Field Instructions

| Field/Section/Button | Instructions |
|---|---|
| **Summary of Contributions*** | Enter the amount of the In-Kind funds for each contribution type as necessary. If the desired In-Kind contribution type is not in included in the list, enter a desired type in an *Other* text box and enter an amount for the *Other* In-Kind type in the text box next to the In-Kind type.<br><br>Maximum text for the *Other* field is 50 characters, about 10 words. Maximum number for the amount is 12 digits. You can enter up to three *Other* In-Kind types.<br><br>*Note:* At least one In-Kind contribution amount must be entered. |
| **Attach Additional Details** | Enter the complete path for the document that you want to upload as an attachment or click Browse to navigate to the location where the document is saved and select the document.<br><br>Maximum text is 200 characters, about 40 words.<br><br>*Note:* You can attach only one document to the In-Kind Contributions section. However, you can attach documents multiple times. The system overwrites the previously attached document each time you attach a new one. Attached documents cannot exceed 10MB in size. |
| **Save** | Click *Save* to save the information you entered and return to the In-Kind Contributions list page.<br><br>If any fields on the page are incomplete or invalid when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the In-Kind Contributions list page. |

*= Required field

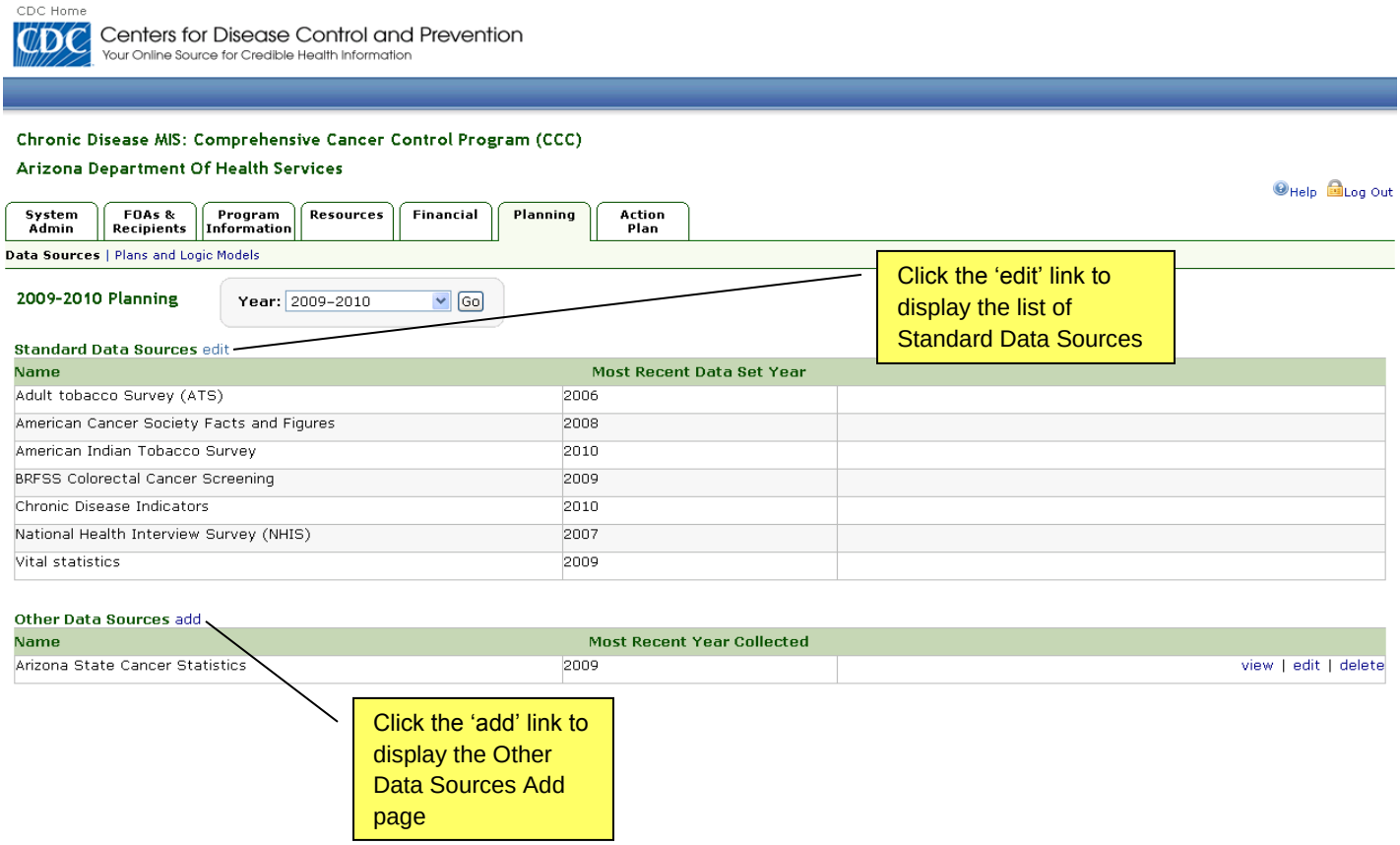
# Planning Tab

The Planning section is used to identify data sources and plans used to support the Project Period and Annual Objectives. Planning includes Data Sources and Plans and Logic Models

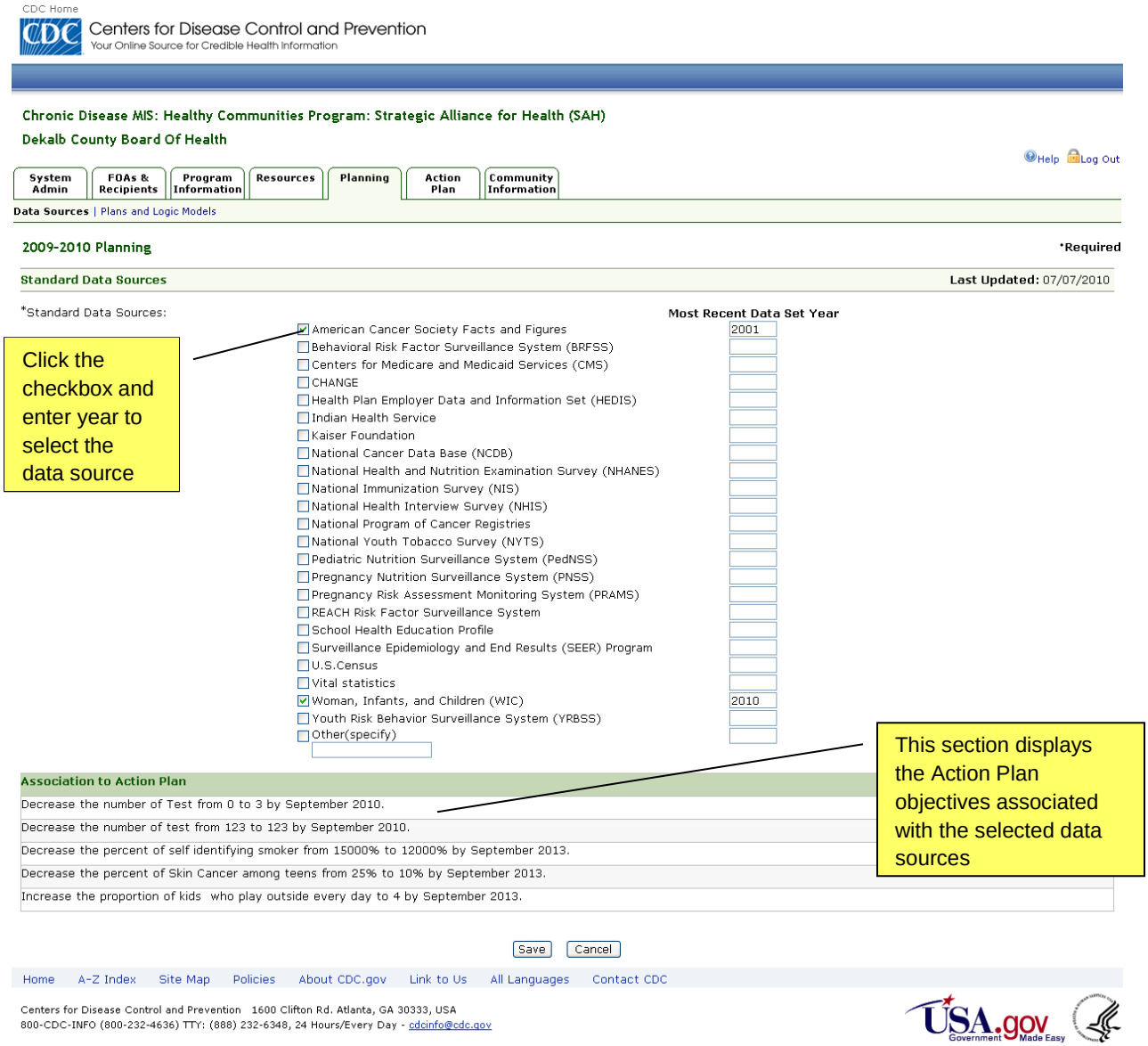
## Data Sources

The Data Sources list page displays a listing of the selected Standard Data Sources and a separate listing of the Other Data sources that are user defined.

- Edit the Standard Data Sources to select the data source used. You cannot add to the list of standard data sources. You may add an 'Other Data Source' if the data source used is not included in the Standard Data Sources list.

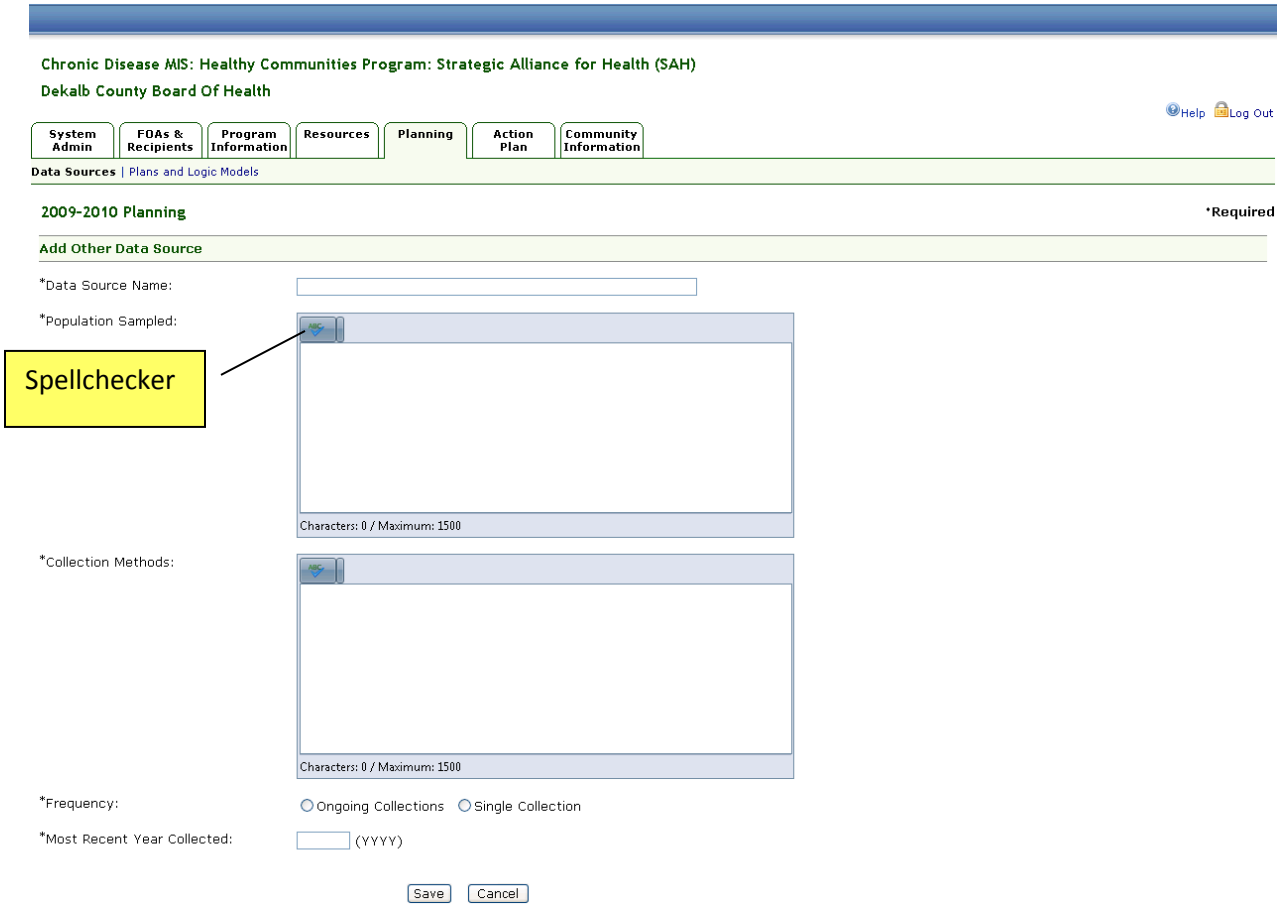


- To indicate use of a Standard Data Source, click the checkbox and enter the data set year.



## Add Other Data Source:

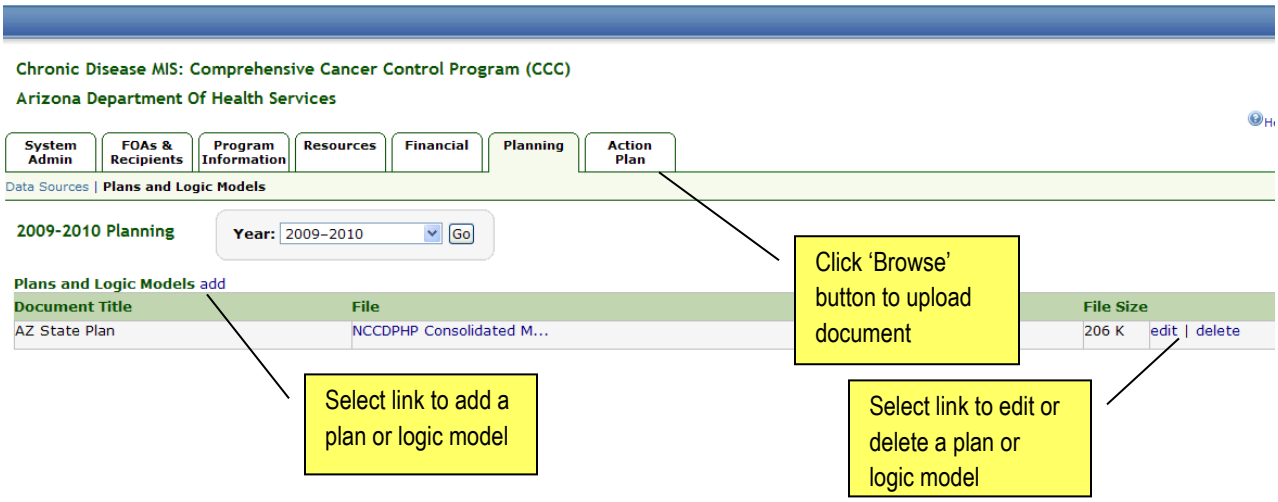
1. Click the ‘add’ link on the Data Sources List page.
2. Enter the required information
3. Click the ‘Save’ button



# Plans & Logic Models

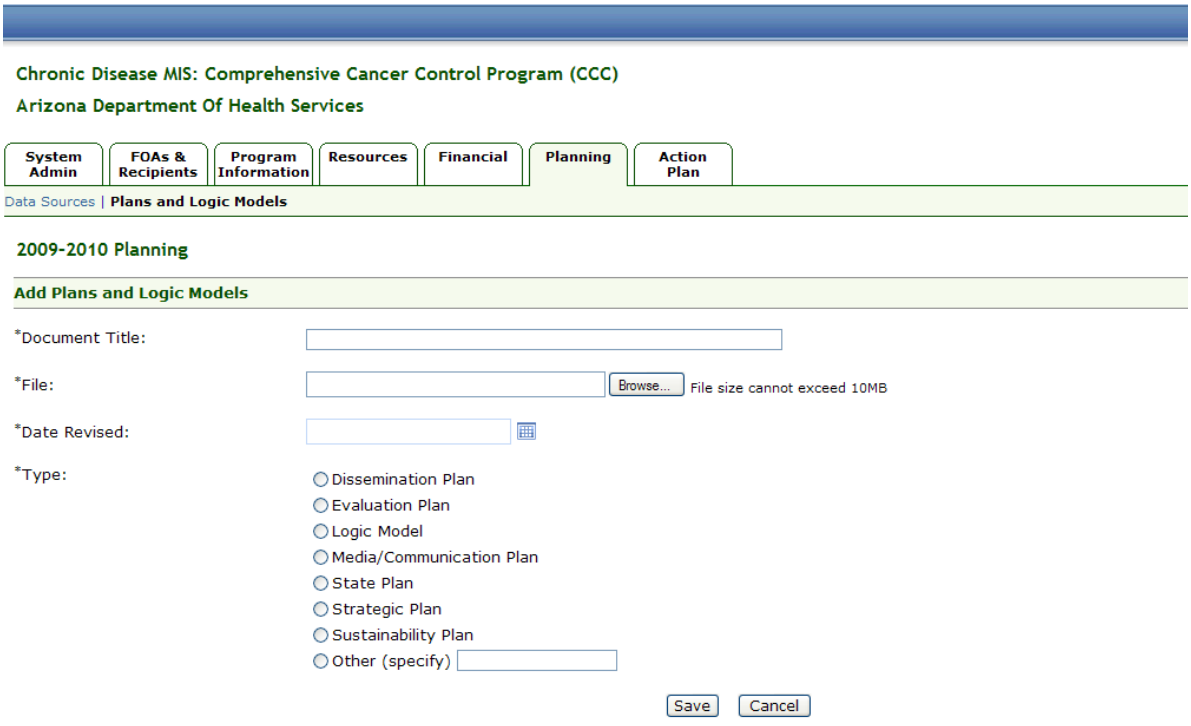
## Plans and Logic Models – List page

The List page displays a summary of all plans and logic models you have added. From the List page, you are able to link to the 'add', 'edit' and 'delete' pages.



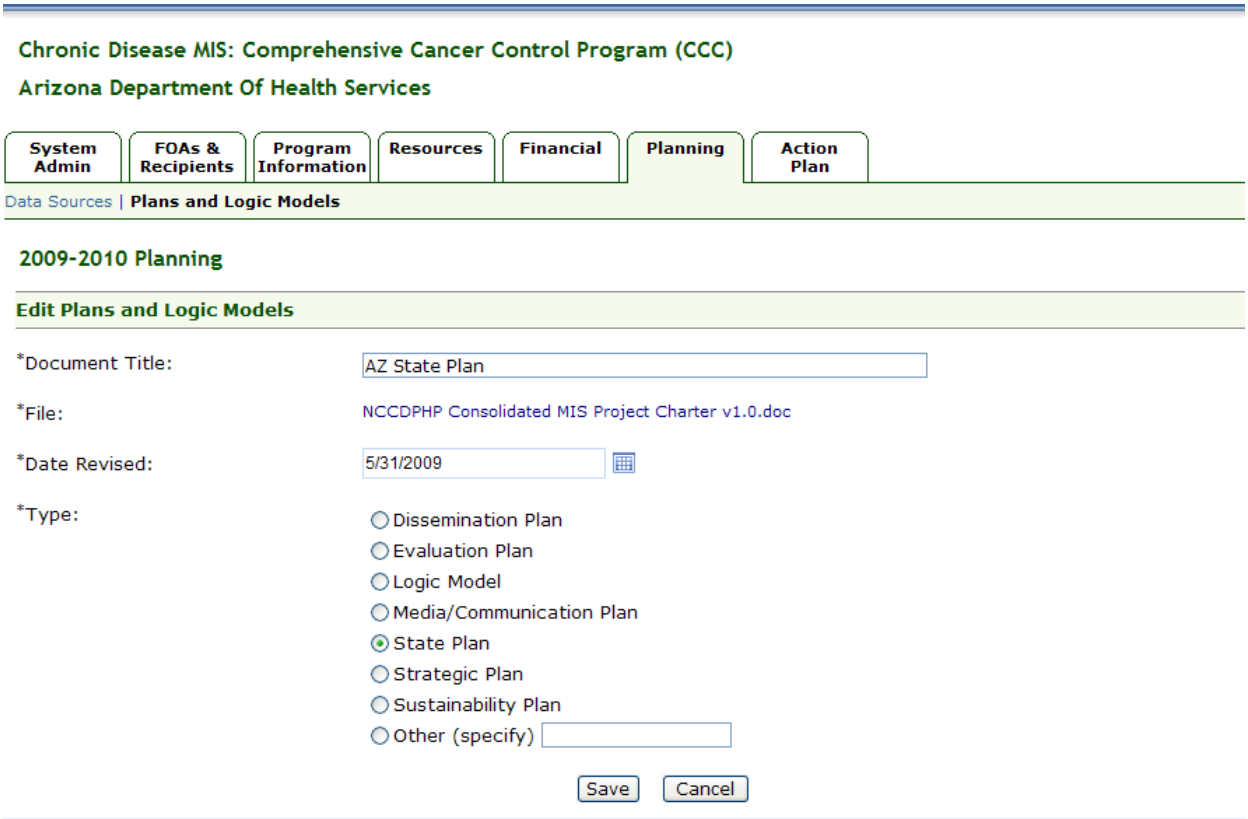

## Add Plans and Logic Models

1. Select the 'add' link from the Plans and Logic Models list page to display the add page.
2. Complete applicable fields
3. Click 'Browse' button to locate document to be uploaded
4. Click the 'Save' button



## Edit Plans and Logic Models

1. Select the edit link from the Plans and Logic Models list page to display the edit page
2. Select new list options or type over existing fields




## Delete Plans and Logic Models

1. Select the delete link from the Plans and Logic Models list page. The delete confirmation message will be displayed.
2. Select 'Yes' to confirm delete or 'No' to cancel delete.

Chronic Disease MIS: Comprehensive Cancer Control Program (CCC)

Arizona Department Of Health Services

System Admin | FOAs & Recipients | Program Information | Resources | Financial | Planning | Action Plan

Data Sources | **Plans and Logic Models**

## 2009-2010 Planning

### Delete Attachment

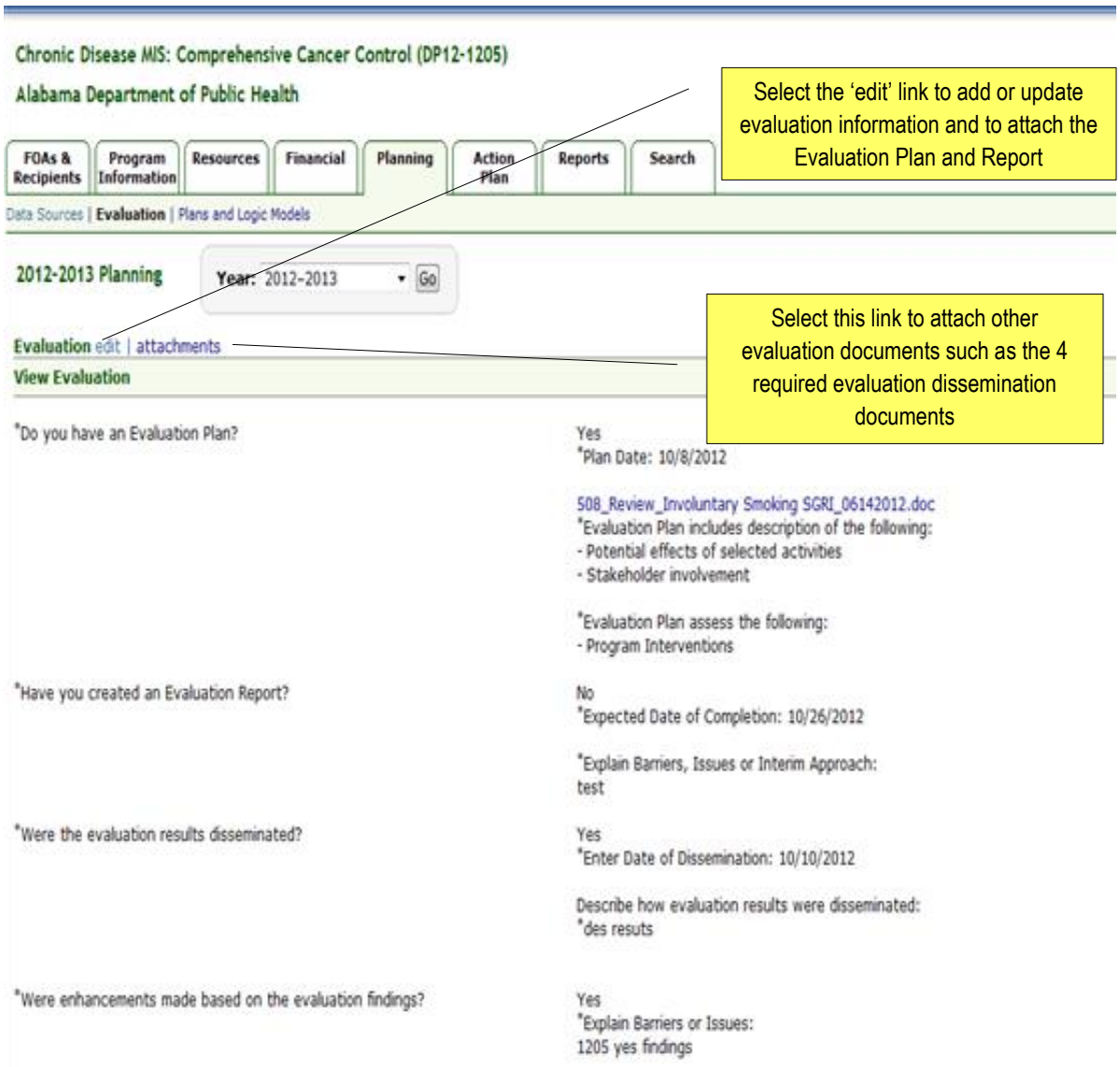
Are you sure you want to delete **AZ State Plan** as a Plan/Logic Model?

Yes No

# Evaluation (Comprehensive Cancer Control (CCC) FOAs only)

## Evaluation - List Page

The Evaluation List page displays a summary of all plans and reports you have added. From the List page, you are able to view plans and reports, edit plans and reports or added attachments.

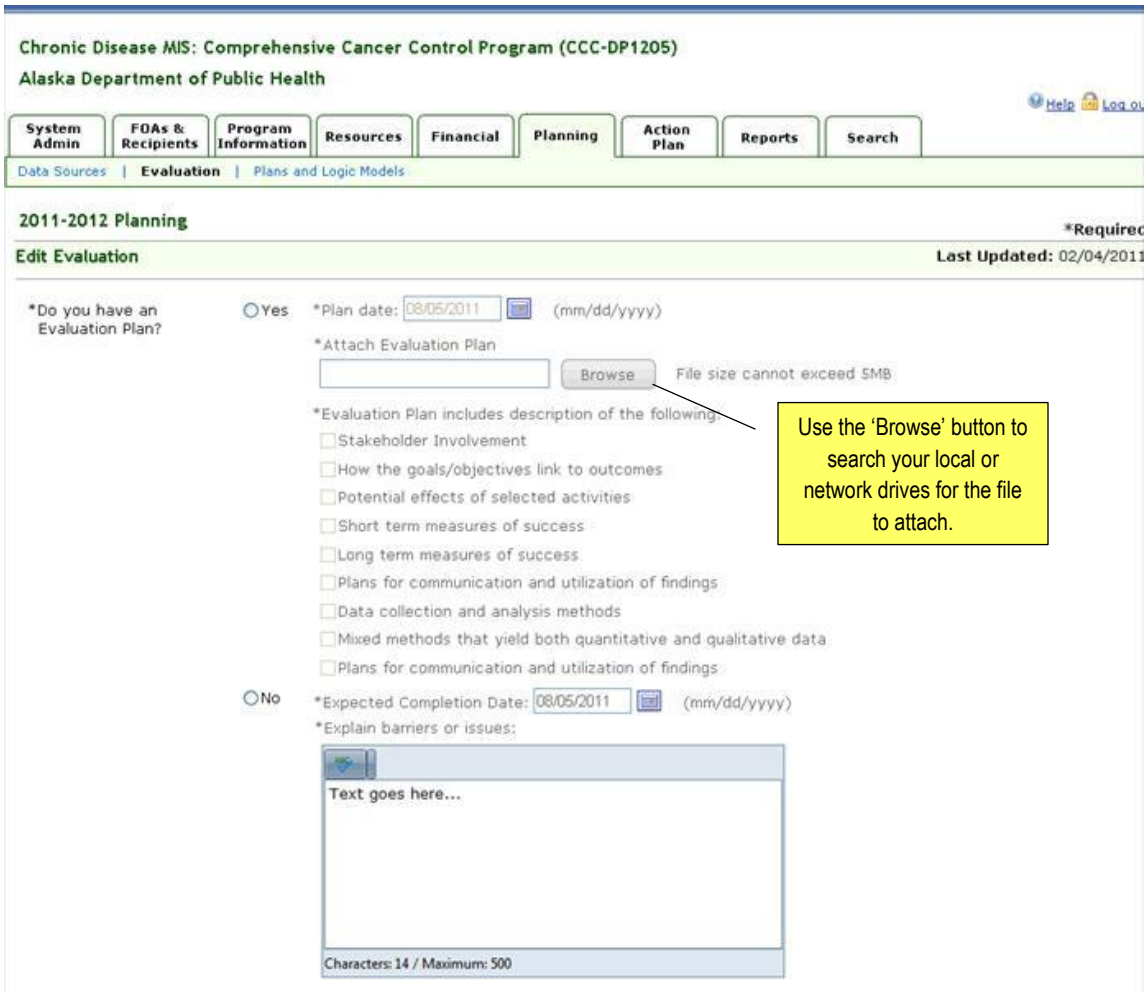


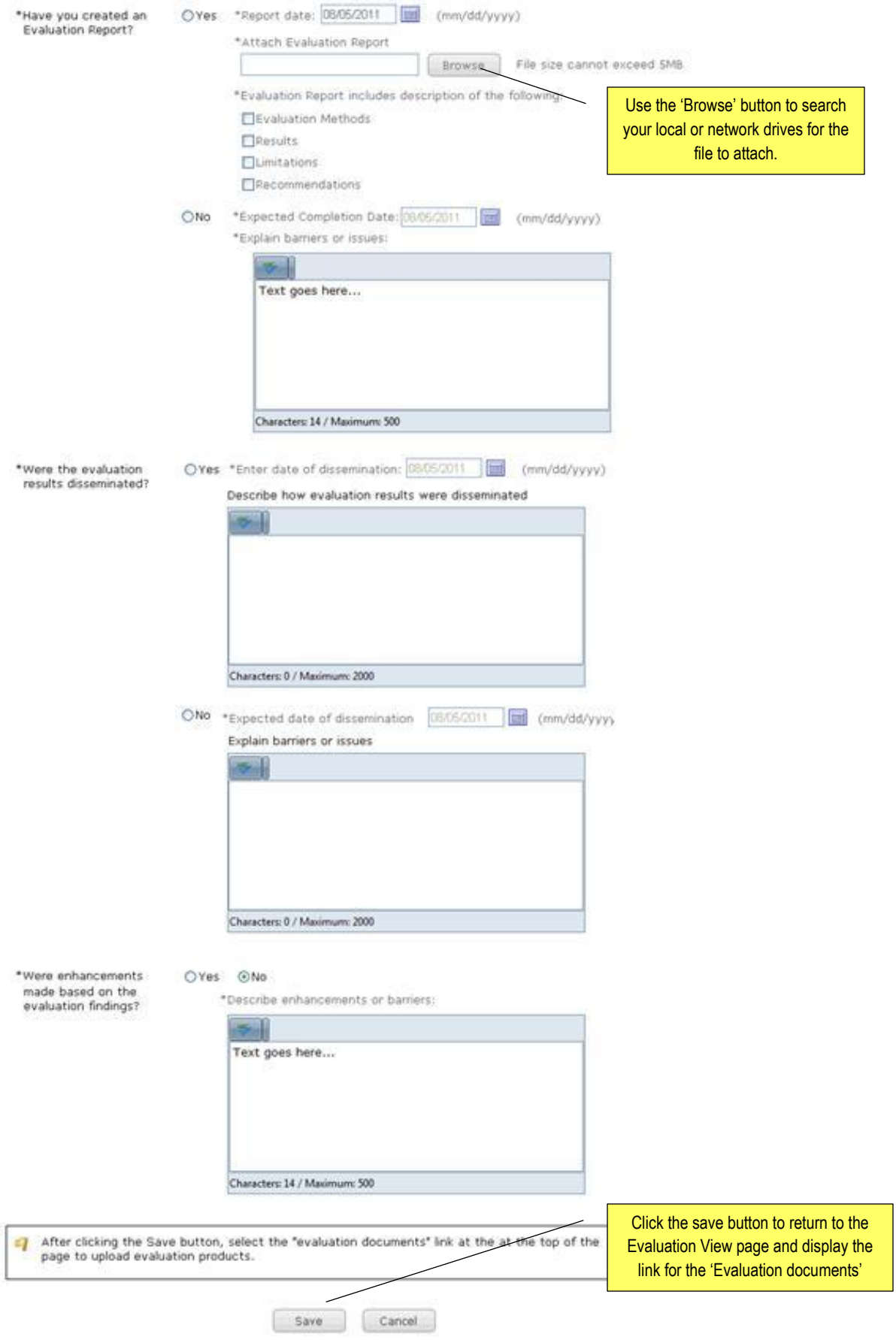

## Planning: Evaluation Add/Edit

The Evaluation add/edit page will be used to enter or update information about your evaluation plan and report. Information on this page is not transferred to the upcoming year and must be entered on an annual basis. Your completed evaluation plan and report must be attached on this page. Other documentation, such as the 4 required evaluation dissemination documents, will be attached on the Evaluation Documents page.

- Select the appropriate response options to question on the evaluation page.

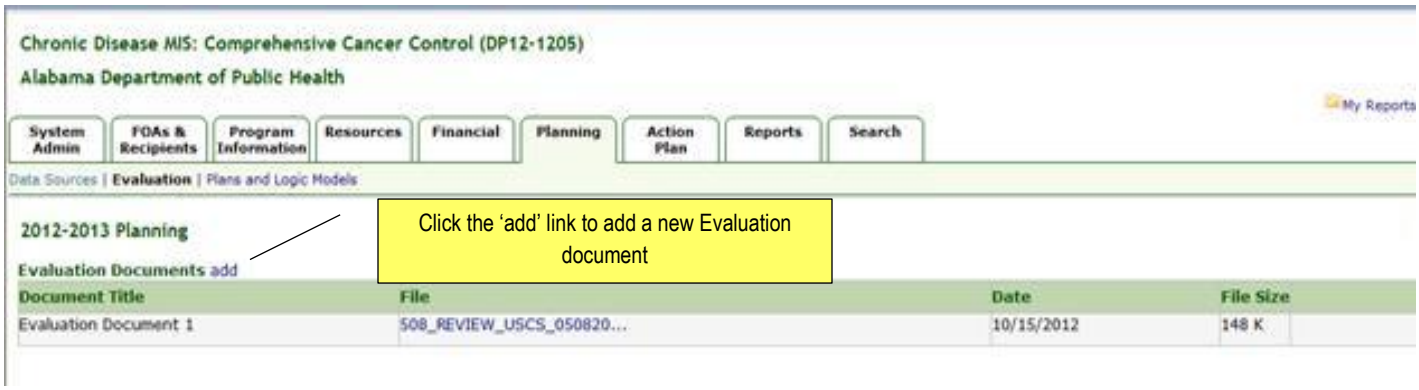
- Click the browse button to attach the required evaluation plan and report.
  - If 'yes' response you're required to attach the evaluation plan or report and respond to all related questions.
  - If 'no' response, you must enter the expected completion date and explain any barriers or issues.




*Have you created an Evaluation Report?
Yes
*Report date: 08/05/2011
(mm/dd/yyyy)
*Attach Evaluation Report
Browse...
File size cannot exceed 5MB
*Evaluation Report includes description of the following:
Evaluation Methods
Results
Limitations
Recommendations
No
*Expected Completion Date: 08/05/2011
(mm/dd/yyyy)
*Explain barriers or issues:
Text goes here...
Characters: 14 / Maximum: 500
*Were the evaluation results disseminated?
Yes
*Enter date of dissemination: 08/05/2011
(mm/dd/yyyy)
Describe how evaluation results were disseminated
Characters: 0 / Maximum: 2000
No
*Expected date of dissemination 08/05/2011
(mm/dd/yyyy)
Explain barriers or issues
Characters: 0 / Maximum: 2000
*Were enhancements made based on the evaluation findings?
Yes
No
*Describe enhancements or barriers:
Text goes here...
Characters: 14 / Maximum: 500
After clicking the Save button, select the "evaluation documents" link at the at the top of the page to upload evaluation products.
Save
Cancel
Use the 'Browse' button to search your local or network drives for the file to attach.
Click the save button to return to the Evaluation View page and display the link for the 'Evaluation documents'

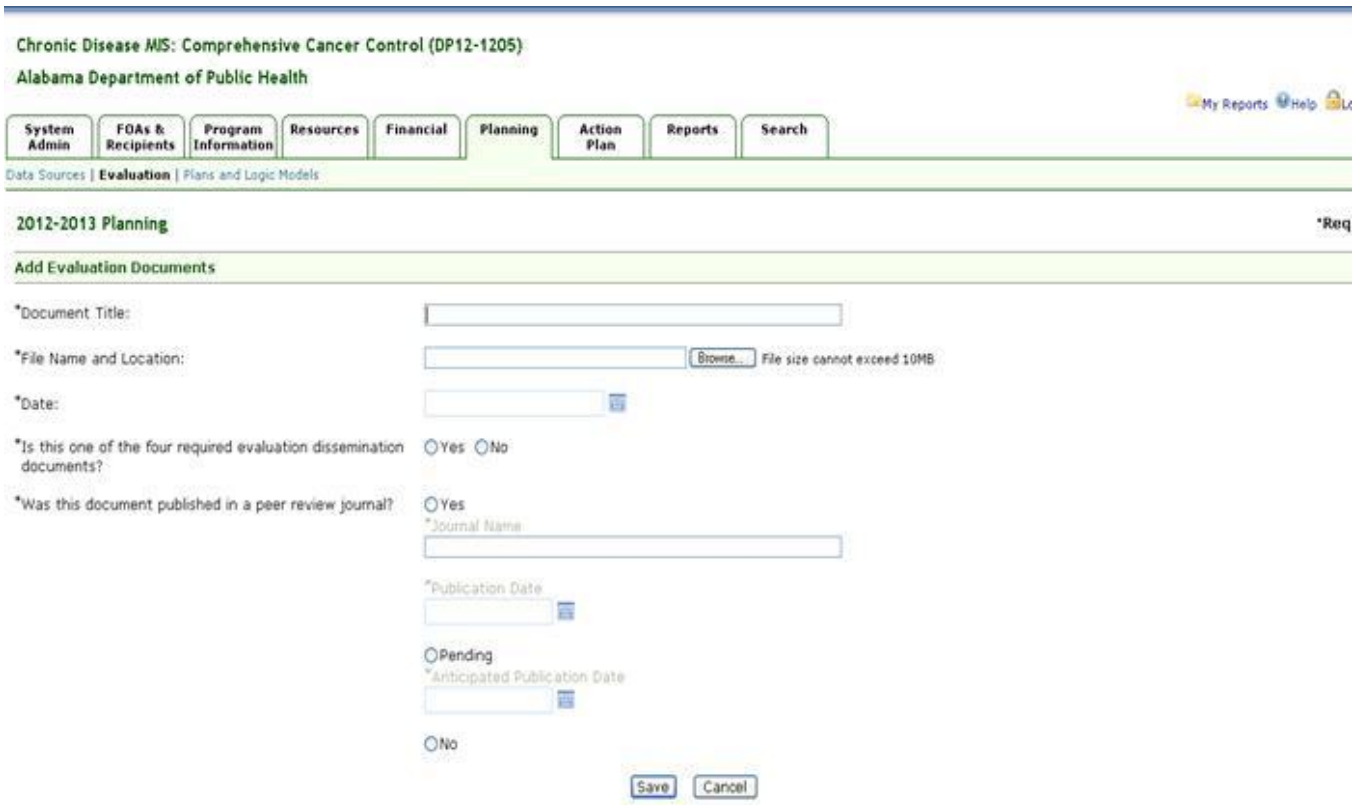
## Planning: Evaluation Documents

- Use the Evaluation Documents section to attach related evaluation products such as the 4 required evaluation dissemination documents




## Planning: Evaluation Documents Add/Edit

- Enter the required information to attach the evaluation document



## Evaluation Field Instructions

| Field/Section/Button | Instructions |
|---|---|
| **Do you have an Evaluation Plan?*** | Indicate by selecting *Yes* or *No* if you do or do not have an evaluation plan. |
| **Plan Date*** | If you have an evaluation plan and selected *Yes*, enter the date that the evaluation plan was completed in the text box in MM/DD/YYYY format or select a date from the calendar. |
| **Attach Evaluation Plan*** | If you have an evaluation plan and selected *Yes* in the "Do you have an Evaluation Plan?" field, click **Browse** to navigate to the location where the document that you want to upload as an attachment is saved, and then select the document. |
| **Evaluation Plan includes description of the following*** | If you have an evaluation plan and selected *Yes* in the "Do you have an Evaluation Plan?" field, select options that describe the evaluation plan. |
| **Evaluation Plan assesses the following*** | If you have an evaluation plan and selected *Yes* in the "Do you have an Evaluation Plan?" field, select the options that the evaluation plan assesses. |
| **Expected Date of Completion (MM/DD/YYYY)*** | If you do not have an evaluation plan and selected *No* in the "Do you have an Evaluation Plan?" field, enter the date that you expect the evaluation plan to be completed in MM/DD/YYYY format or select a date from the calendar. |
| **Explain barriers or issues*** | If you do not have an evaluation plan and selected *No* in the "Do you have an Evaluation Plan?" field, explain the barriers or issues that are preventing you from creating an evaluation plan.<br><br>Maximum text is 2000 characters, about 400 words. |
| **Have you created an Evaluation Report?*** | Indicate by selecting *Yes* or *No* if you have or have not created an evaluation report. |

**Attach Report***

If you have created an evaluation report and selected *Yes* in the "Have you created an Evaluation Report?" field, click **Browse** to navigate to the location where the document that you want to upload as an attachment is saved and select the document.

**Report Date***

If you have created an evaluation report and selected *Yes* in the "Have you created an Evaluation Report?" field, enter the date that the evaluation plan was completed in the text box in mm/dd/yyyy format or select a date from the calendar.

**Evaluation Report includes description of the following?***

If you have created an evaluation report and selected *Yes* in the "Have you created an Evaluation Report?" field, select the response options that the evaluation plan addresses.

**Were the evaluation results disseminated?***

Indicate by selecting *Yes* or *No* if the evaluation results in the evaluation report have been disseminated.

**Enter Date (mm/dd/yyyy)***

If you have created an evaluation report and evaluation results have been disseminated, enter the date that the results were disseminated in the evaluation report were disseminated in mm/dd/yyyy format.

**Describe how evaluation results were disseminated***

If you have created an evaluation report and evaluation results have been disseminated, enter a description of how the results were disseminated.

Maximum text is 2000 characters, about 500 words.

**Expected date of dissemination***

If the evaluation results have not been disseminated, enter the date that you expect the evaluation results to be disseminated or select a date from the calendar.

**Explain barriers or issues***

If the evaluation results have not been disseminated, explain the barriers or issues that are preventing you from disseminating the results.

Maximum text is 5000 characters, about 1000 words.

**Expected Date of Completion (MM/DD/YYYY)***

If you have not created an evaluation plan and selected *No* in the "Have you created an Evaluation Report?" field, enter the date that you expect the evaluation report to be completed in MM/DD/YYYY format or select a

| | |
|---|---|
| | date from the calendar. |
| **Explain barriers or issues*** | If you do not have an evaluation plan and selected *No* in the "Have you created an Evaluation Report?" field, explain the barriers or issues that are preventing you from creating an evaluation plan.<br><br>Maximum text is 5000 characters, about 1000 words. |
| **Were enhancements made based on the evaluation findings?*** | Indicate by selecting Yes or No if any enhancements were made to your program based on the evaluation findings. |
| **Describe enhancements made based on the evaluation findings*** | If enhancements were made to your program based on the evaluation findings, describe the enhancements in detail.<br><br>Maximum text is 5000 characters, about 1000 words. |
| **Save** | Click *Save* to save the Evaluation section. The system saves the information and returns you to the Evaluation view page, where it displays the attachment.<br><br>*Note*: After saving the information, you can select the *Evaluation Documents* link at the top of the page and upload additional evaluation products. |
| **Cancel** | Click *Cancel* to discard any information entered return to the Evaluation view page. |

*= Required field.

### Delete Attachments

When deleting an attachment, you will be asked to confirm your decision. Once an attachment is deleted it is no longer available in the system

# Action Plan

## Introduction:

The Action Plan section serves as a means for states to manage program related work, track the progress and document the results. The information in the Action Plan section is organized and displayed in a hierarchical fashion with the Project Period Objective at the top of the Hierarchy. Annual Objectives and Progress may be added for a Project Period Objective. Activities, products and progress may be added for an Annual Objective.

1. **Project Period Objective** (PPO) – Describes the long term 5-year objective. The PPO must be added first before any other action plan components can be added.

    1.1. **Project Period Objective Progress** – Used to document the progress made toward the PPO during the interim or annual reporting period

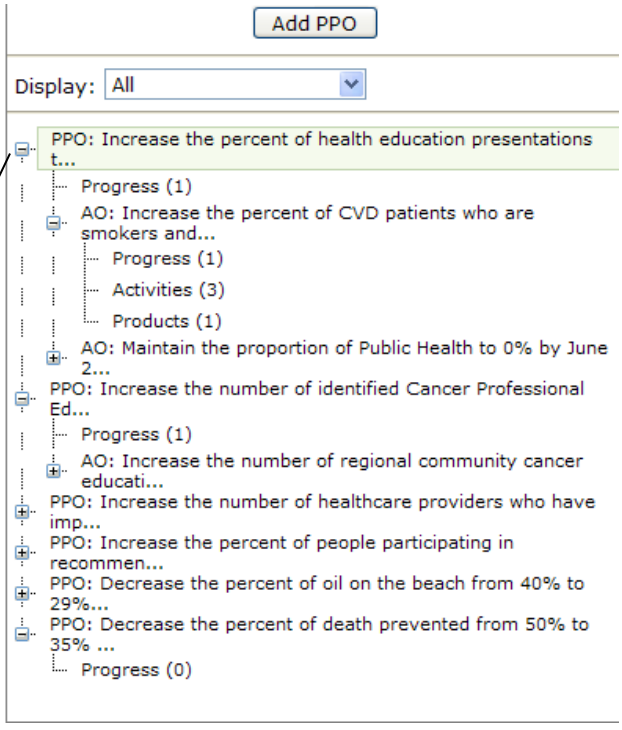
    1.2. **Annual Objective –** Describes the short term annual objective required to meet the longer term PPO. An Annual Objective must be added before Annual Objective Progress, Activity and Product can be added.

        1.2.1. **Annual Objective Progress –** Used to document the progress made toward the Annual Objective during the interim or annual reporting period

        1.2.2. **Activity –** Describes the actual work or action taken to meet the Annual Objective.

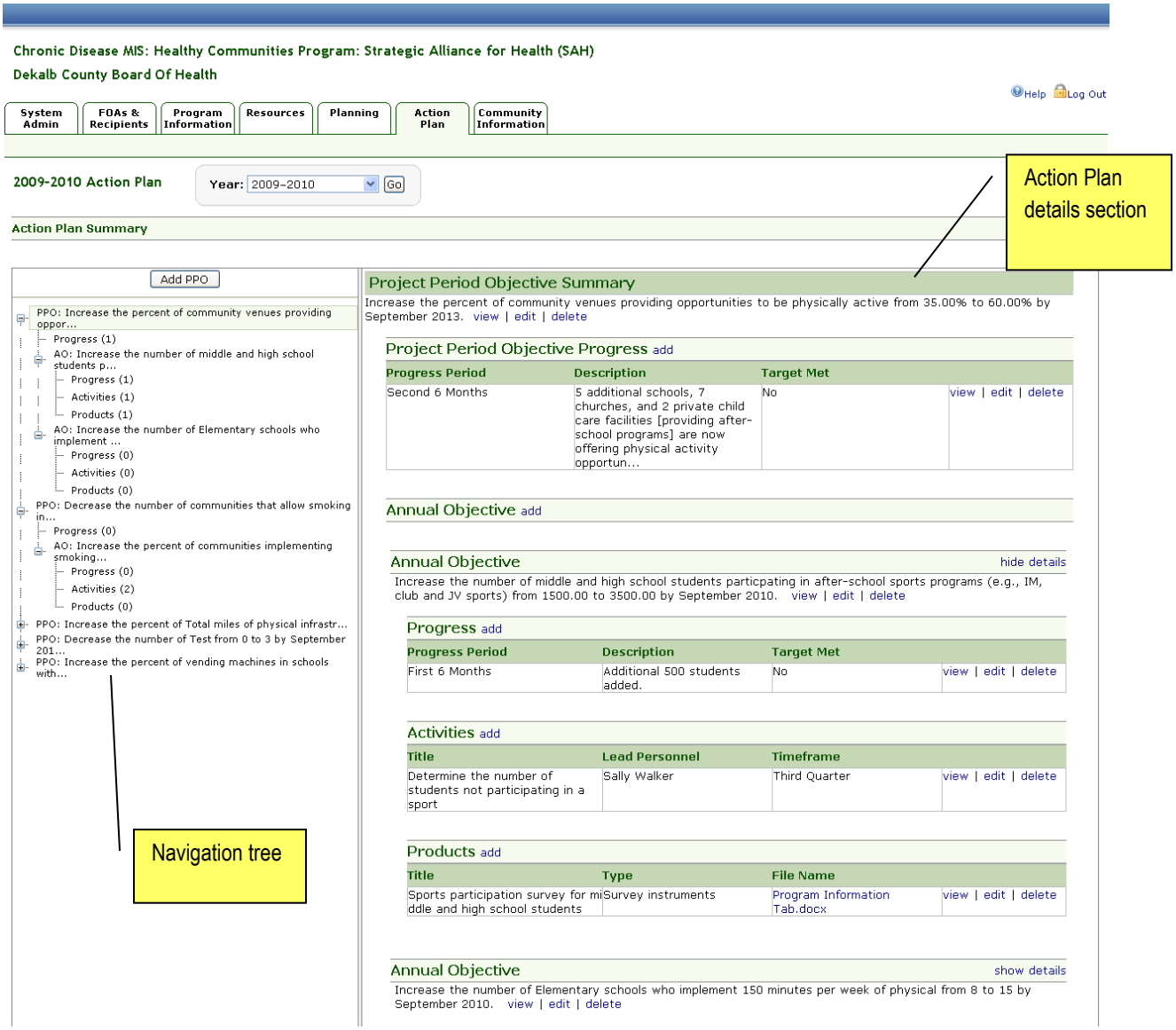
        1.2.3. **Products –** Tangible output or artifact resulting from an activity

Click + or – to collapse or expand view of PPO components



## Action Plan Summary Page

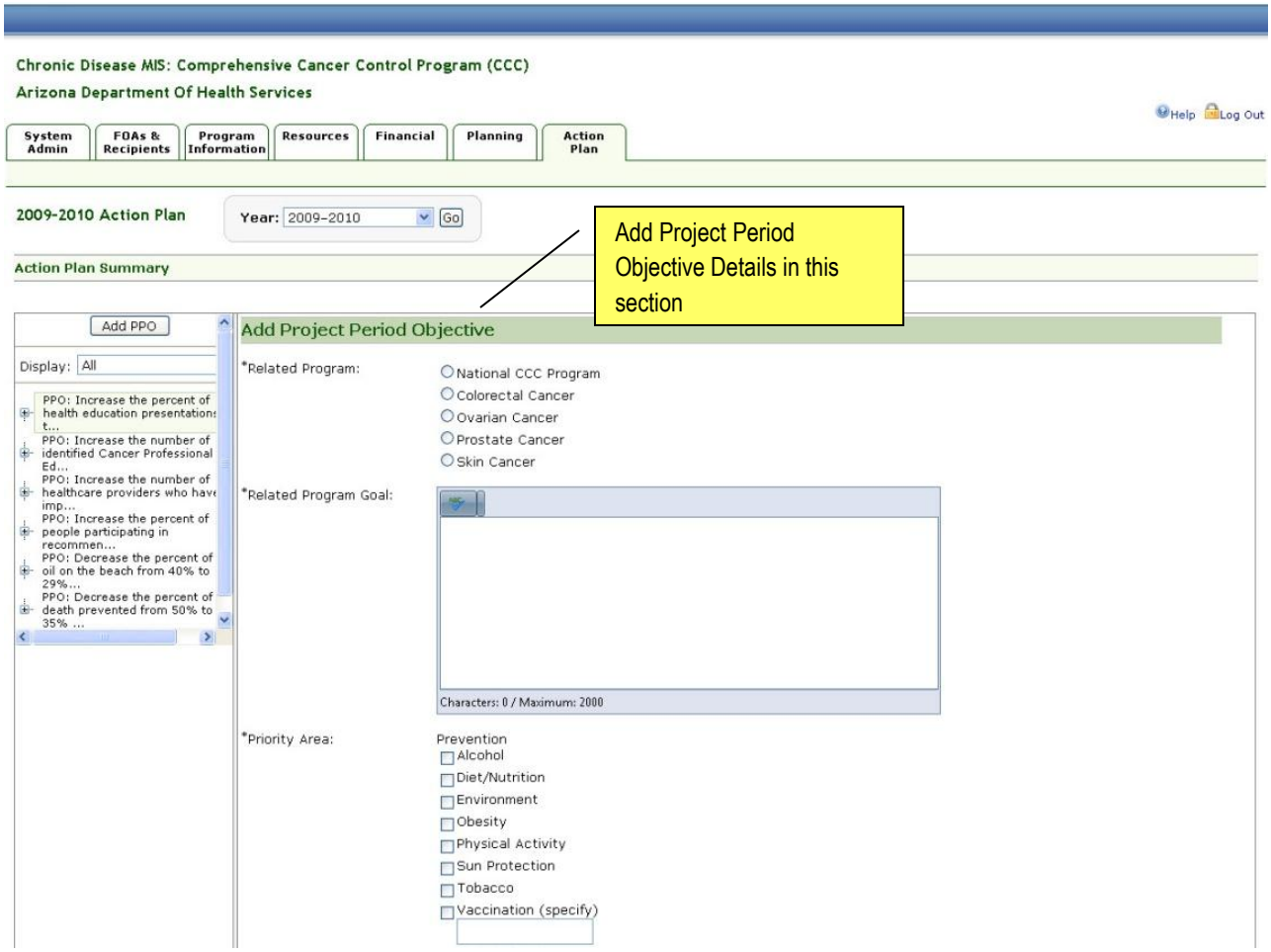
The Action Plan Summary page is divided into two sections. The left side contains a multi-level navigation tree that displays a summarized view of the PPO(s) and its associated Project Period Objective Progress, Annual Objectives, Annual Objective Progress, Activities and Products. The right side is used to display the Action plan details and links to view, add, edit or delete the various components.



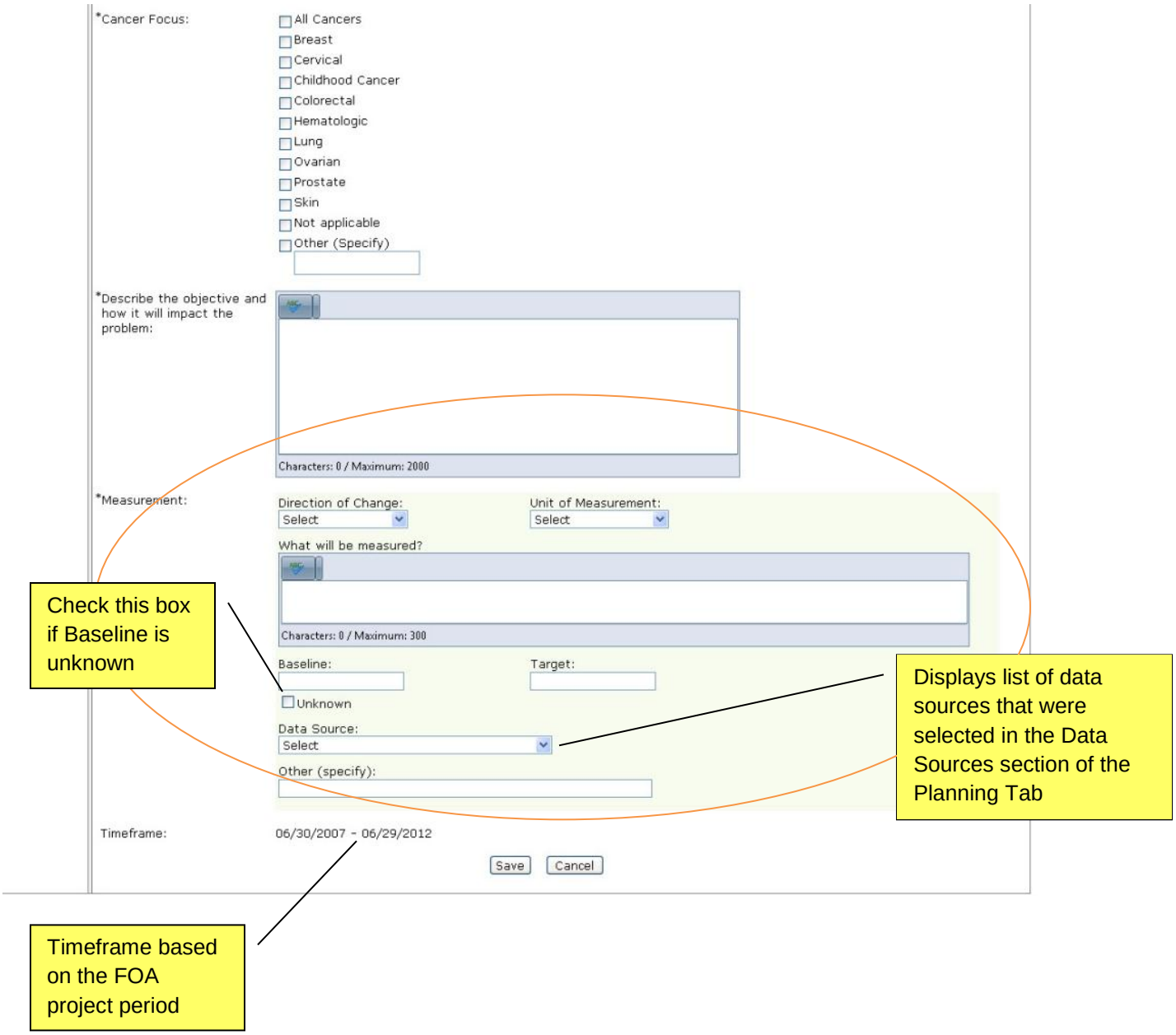
## Add a Project Period Objective:

1. Select the 'Add PPO' button on the navigation tree to display the Add Project Period Objective page.

2. The 'Add Project Period Objective' page is displayed in the Action Plan Detail Section. The fields displayed are specific to each FOA. Please see the Action Plan field instructions at the end of this section for detailed information on adding each field.

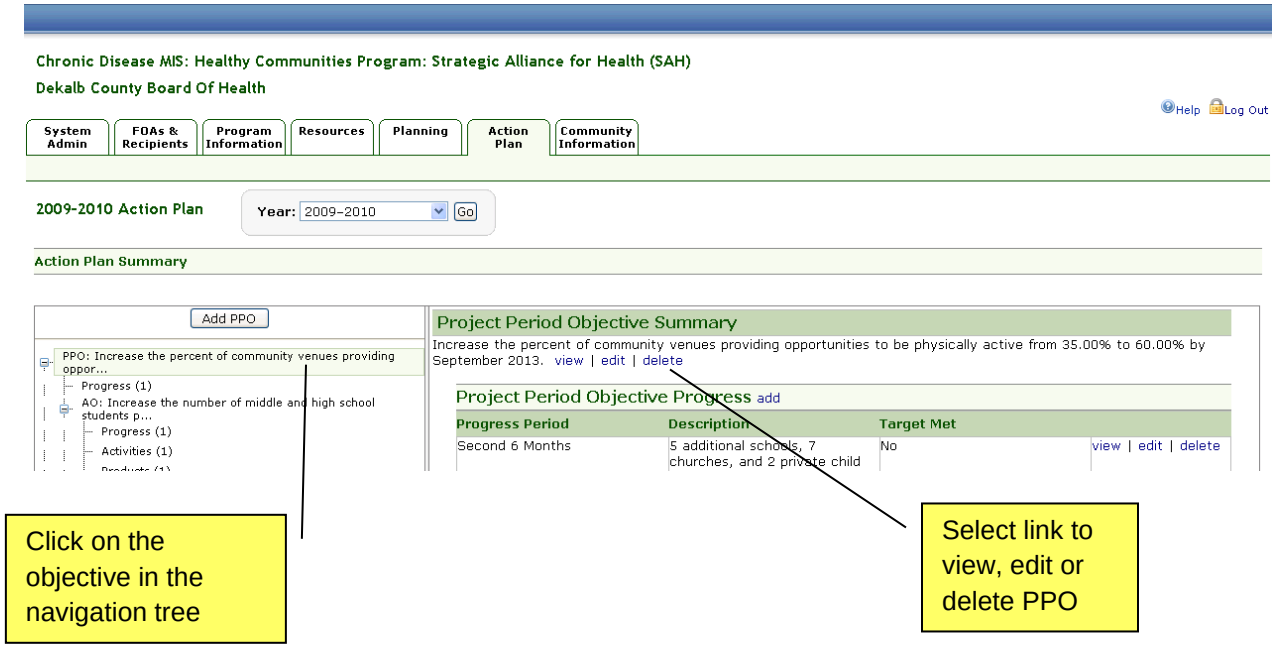


3. Responses entered in Measurement section will be used to generate a SMART objective statement.
    - Direction of Change – Select increase, decrease or Maintain
    - Unit of Measurement – Select 'Percent of', 'Number of', 'Proportion of' or 'Rate of'
    - What will be measured? – Enter text describing what will be measured. Ex: 'outdoor public recreation areas adopting 24/7 tobacco-free policies'
    - Baseline – Enter the baseline number. If unknown, check the 'Unknown' box below the baseline field
    - Target – Enter the objective target number
    - Data Source – Select the data source that will be used to support the objective. This list of data sources are based on the selections made in the Planning Tab – Data Sources section.
    - Timeframe – Defaults to the FOA project period. Depending on the FOA, this date is read-only and cannot be changed. For certain FOAs, the user may select the appropriate state and end dates.

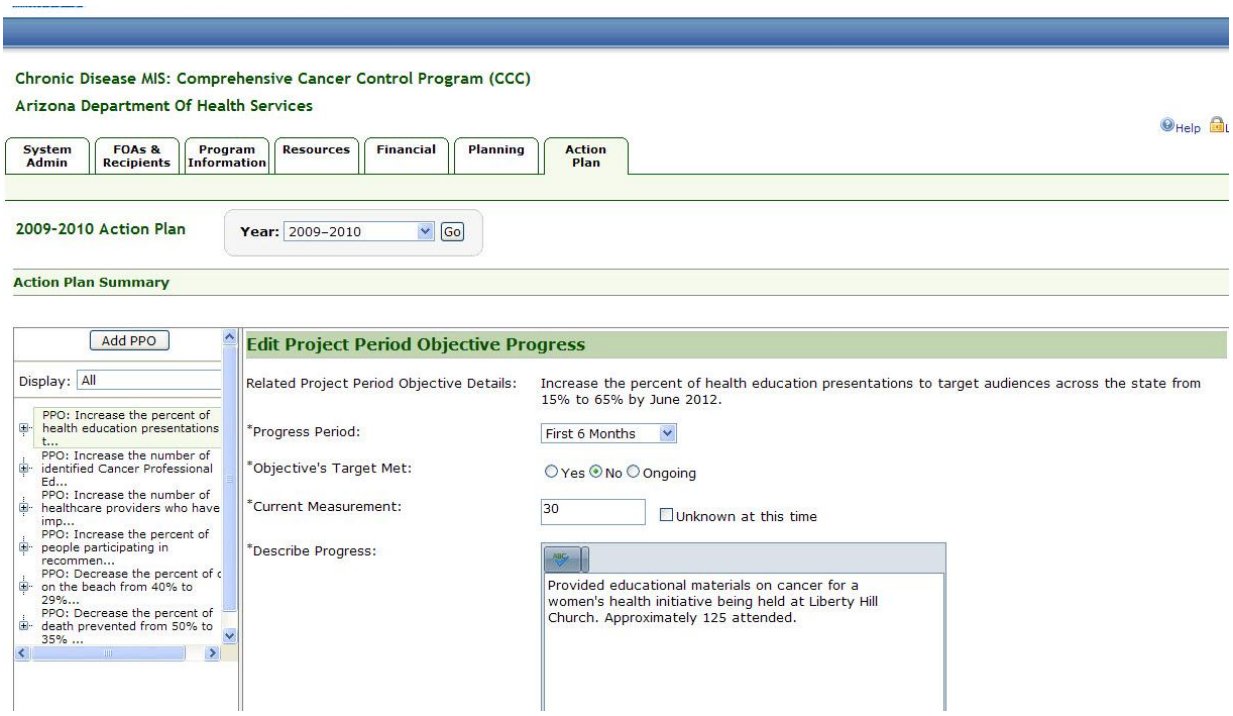


## View, Edit or Delete a Project Period Objective:

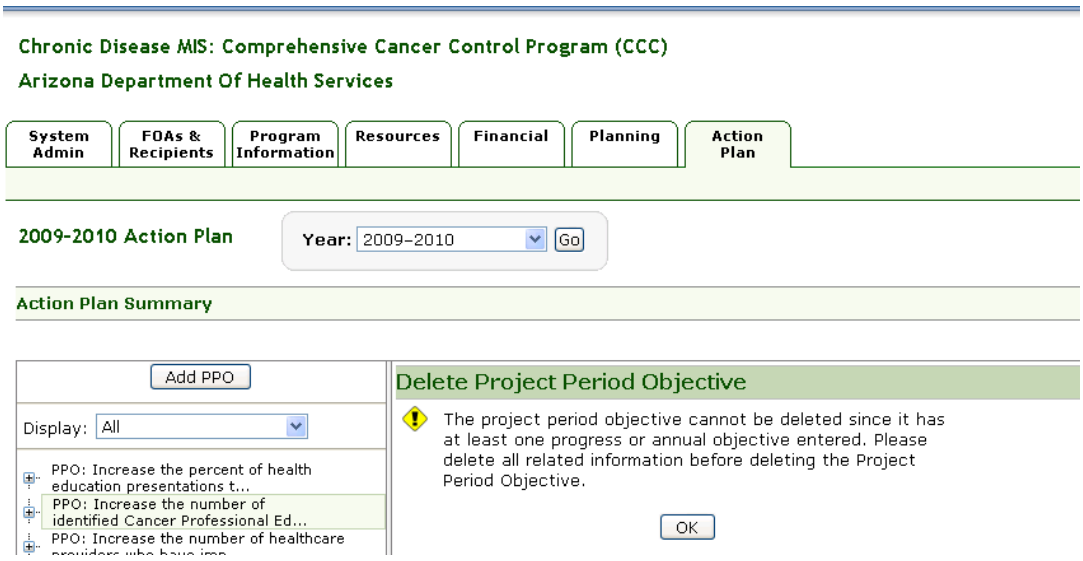
1. Click on the Project Period Objective in the navigation tree to display the Project Period Objective Summary
2. Select the applicable link following the objective in the Project Period Objective Summary to display the view, edit or delete page.




- **View** - information is "read-only" and cannot be changed.
- **Edit** - displays the existing information and allows modifications.

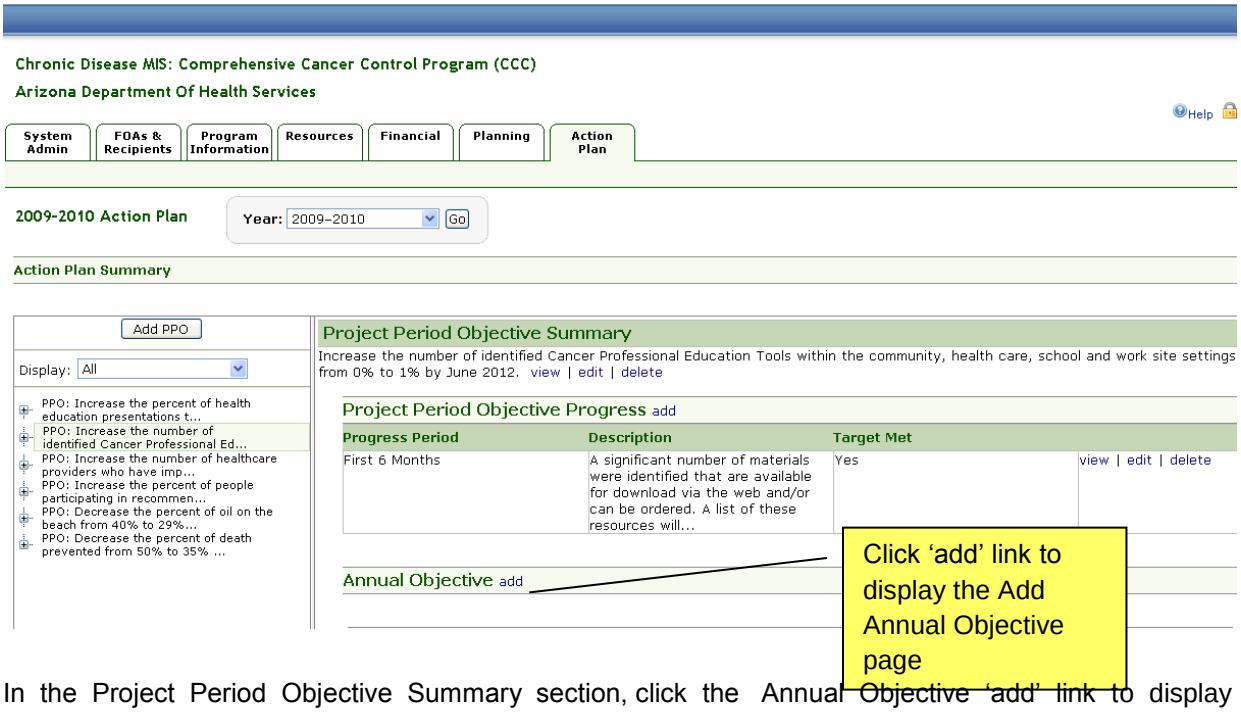


- **Delete** - displays a warning message. If the Project Period Objective is associated with one or more annual objective or PPO progress, the delete of the PPO will not be allowed. The annual objective and/or PPO progress must first be deleted before the PPO can be deleted. If no PPO progress or annual objective exists for the PPO, a delete confirmation message will be issued. The delete will be allowed if the 'Yes' response is selected for the confirmation message.



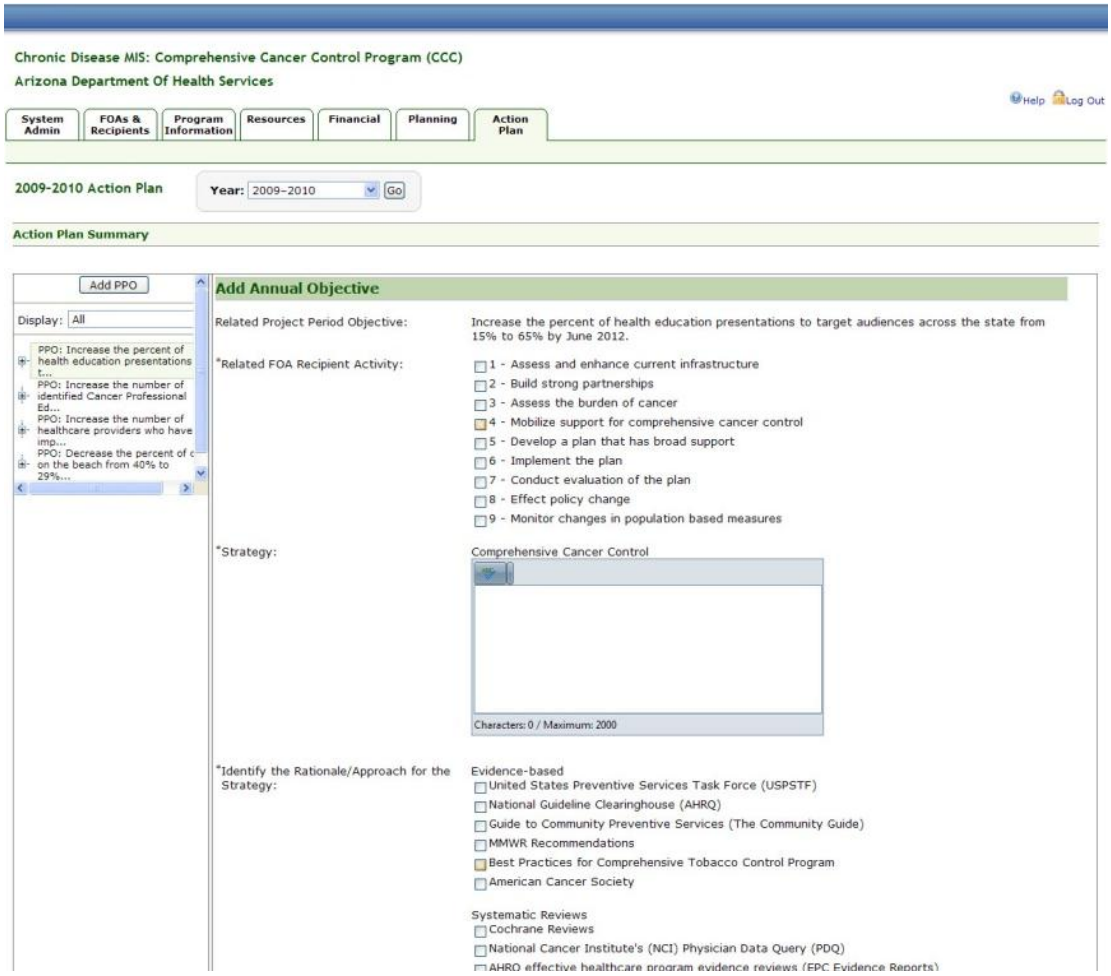

## Add an Annual Objective:

1. Select the 'Project Period Objective' from the navigation tree for which the Annual Objective is being added.

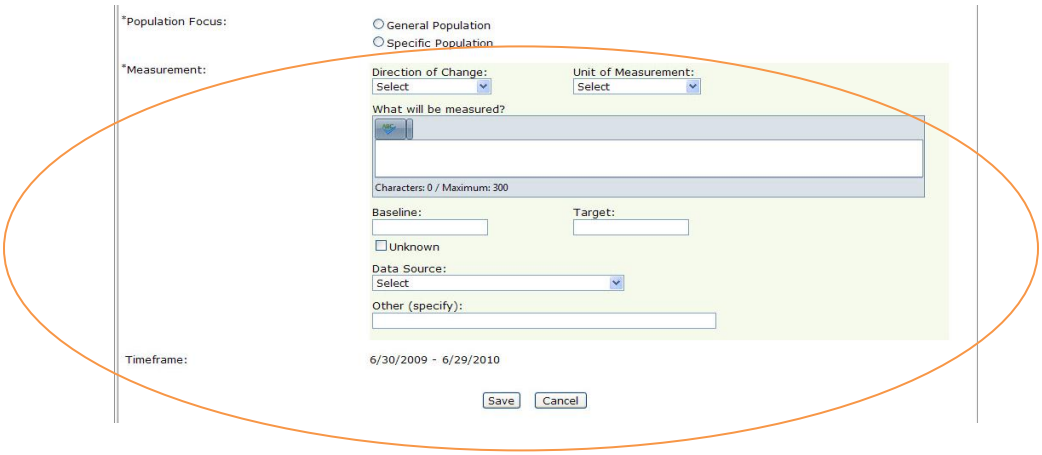



2. In the Project Period Objective Summary section, click the Annual Objective 'add' link to display the Add Annual Objective page.

3. The ‘Add Annual Objective’ page is displayed in the Action Plan detail section. The fields displayed are specific to each FOA. Please see the Action Plan field instructions at the end of this section for detailed information on adding each field.

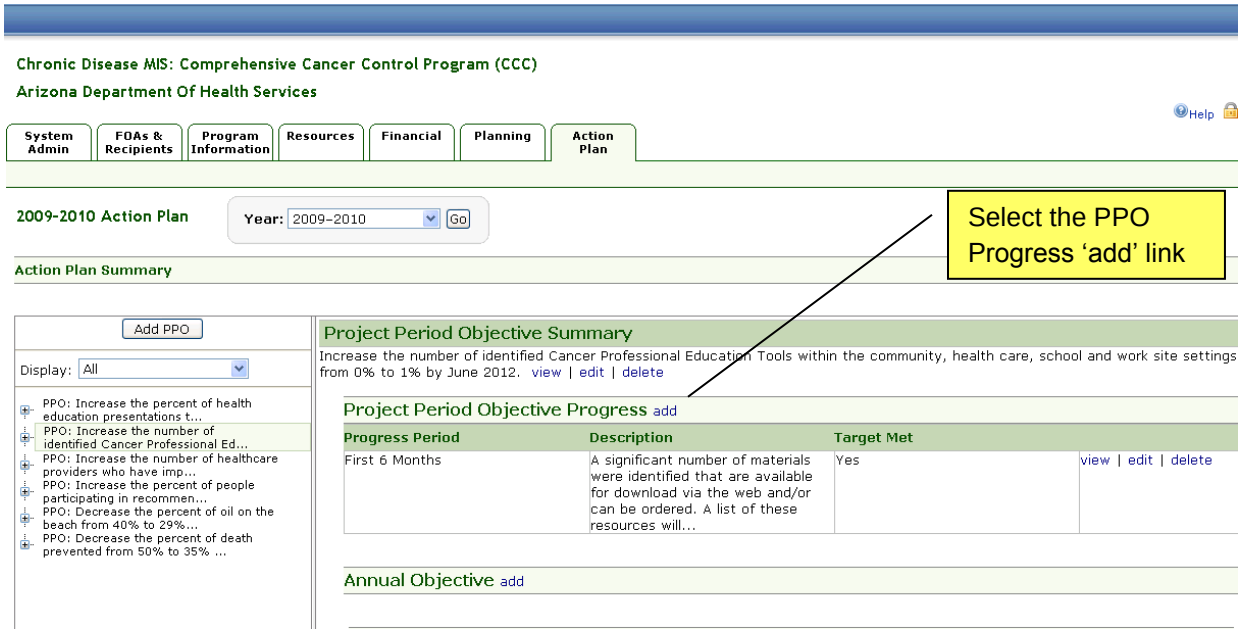



4. Complete the fields required to add the Annual Objective. As indicated in the PPO section above, the Measurement section fields are designed to create the SMART statement based on your responses.

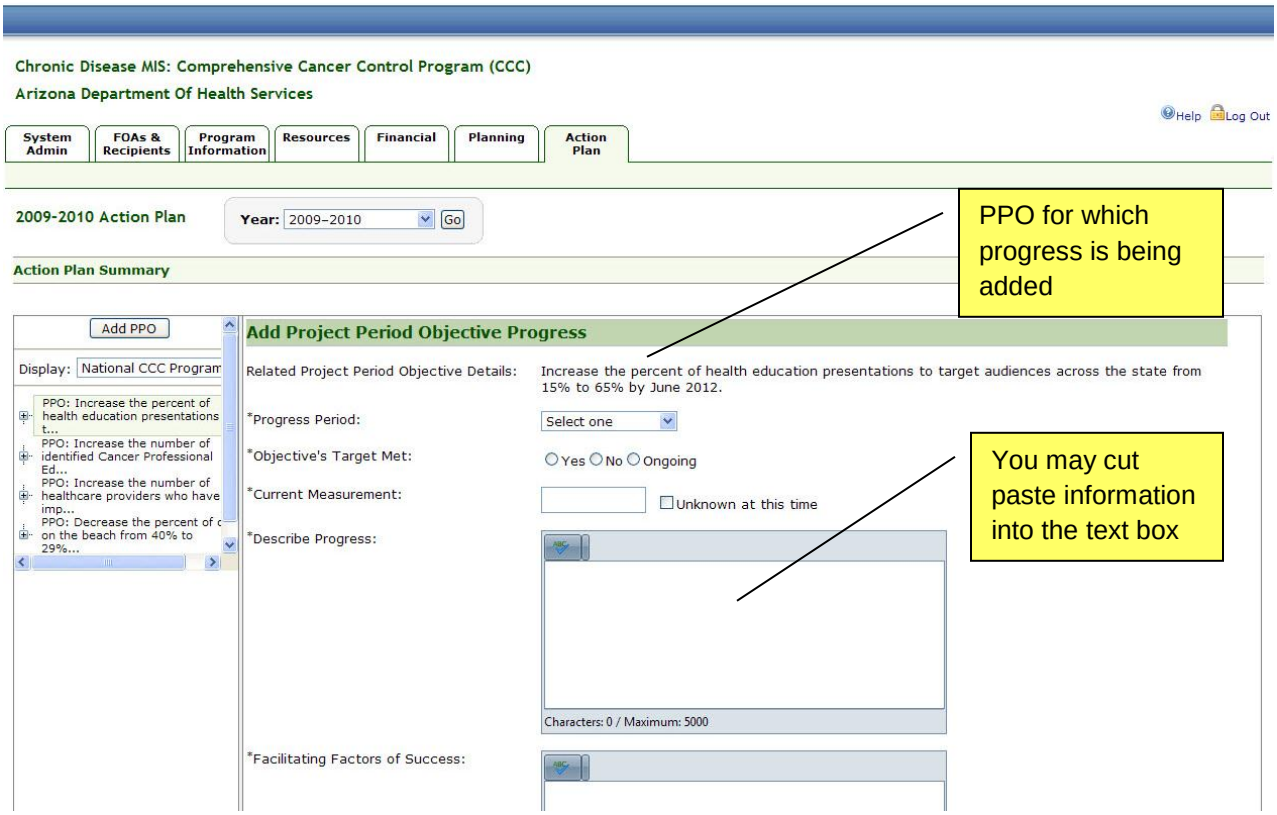


## Add Progress for a Project Period Objective (PPO Progress):

1. Select the PPO for which progress is being added from the navigation tree
2. Select the 'Project Period Objective Progress add' link from the PPO Summary section

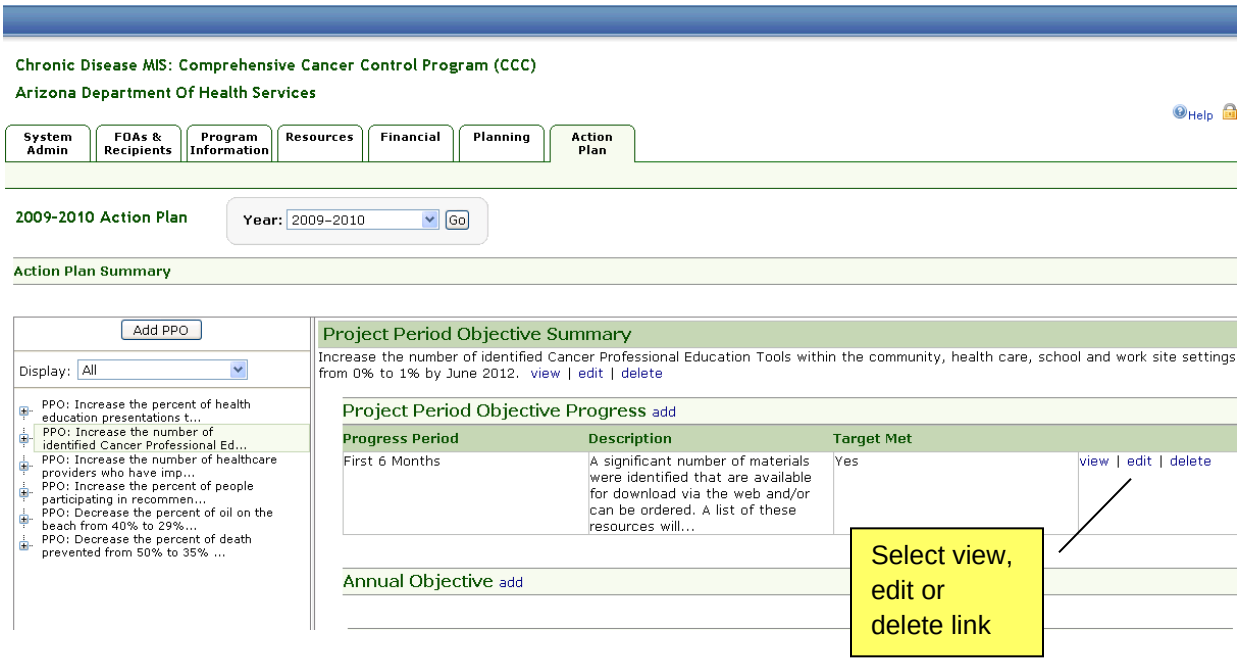



3. The Add Project Period Objective Progress page will be displayed. Complete the required fields to add the PPO progress. The fields displayed are specific to each FOA. Please see the Action Plan field instructions at the end of this section for detailed information on adding each field.

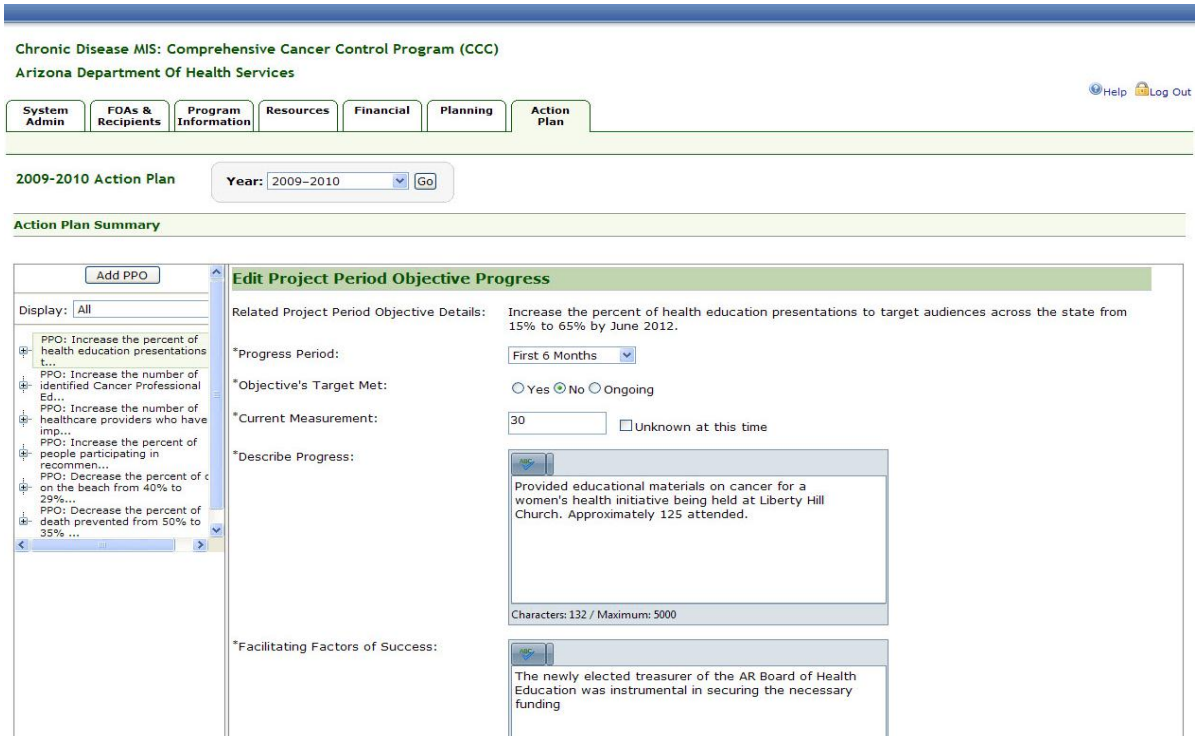


## View or Edit or Delete Progress for a Project Period (PPO Progress):

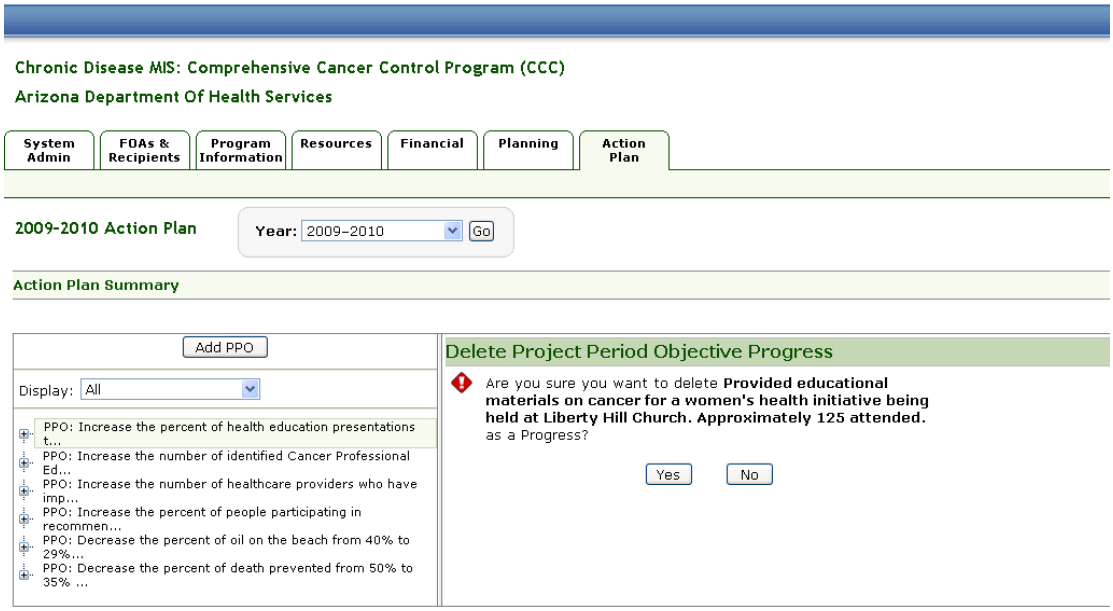
1. Click on the Project Period Objective in the navigation tree to display the Project Period Objective Summary.
2. Under the Project Period Objective Progress, select the applicable link for the desired Progress Period to display the view, edit or delete page.




- **View** - information is "read-only" and cannot be changed.
- **Edit** - displays the existing information and allows modifications.

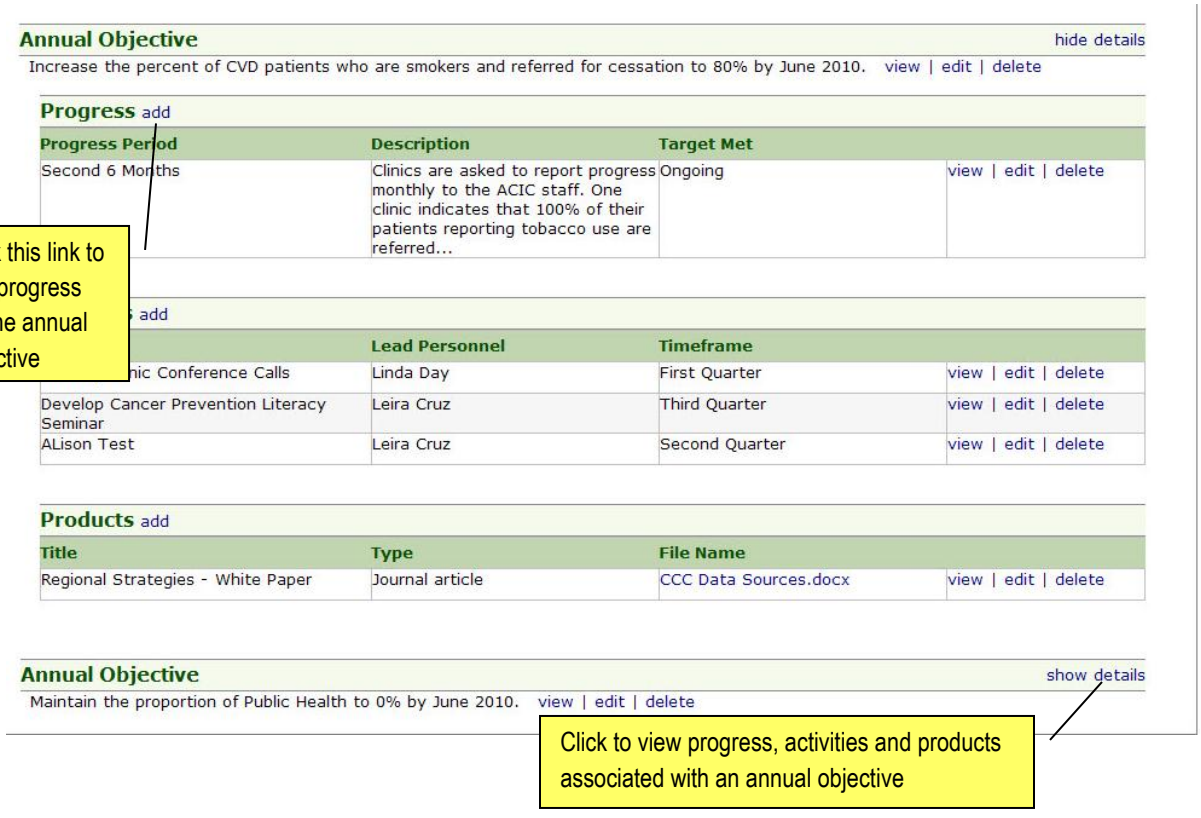



- **Delete** - displays a delete confirmation message. Select 'Yes' to delete the PPO Progress or 'No' to cancel the delete action.



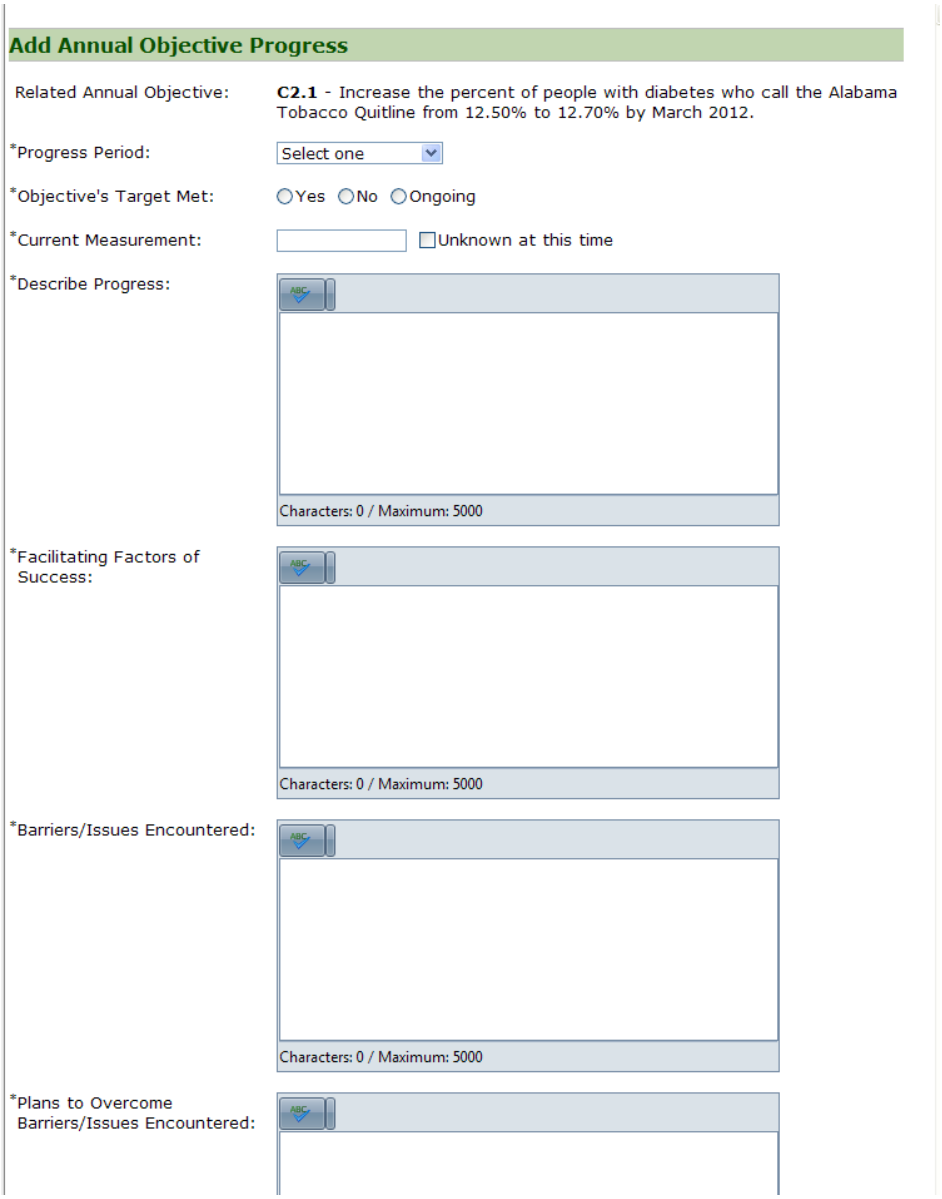

## Add Progress for an Annual Objective:

1. Select the PPO for which the annual objective progress is being added in the navigation tree to display the Project Period Objective Summary.
2. Locate the annual objective for which progress is to be added and select the 'Show Details' link to display the Progress, Activities and Products associated with the Annual Objective.



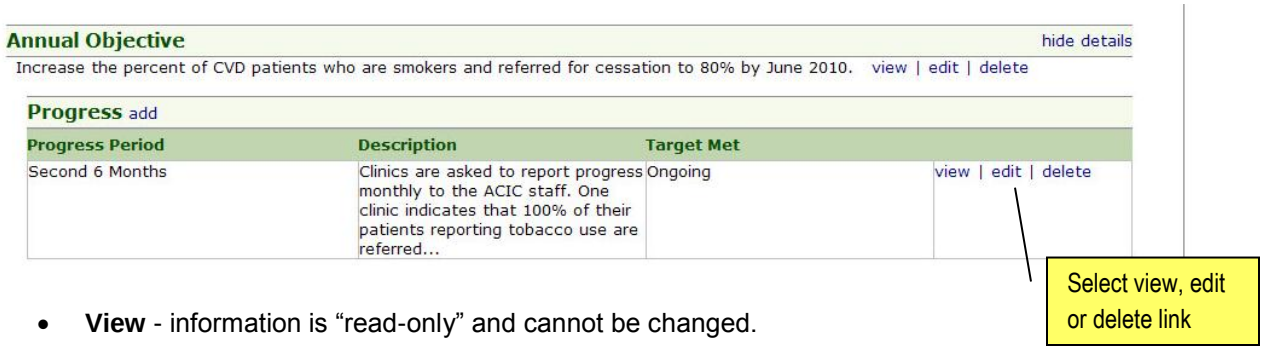

3. Click the Progress 'add' link to display the Add Annual Objective Progress page.

4. Complete the required fields to add the Annual Objective progress. The fields displayed are specific to each FOA. Please see the Action Plan field instructions at the end of this section for detailed information on adding each field.

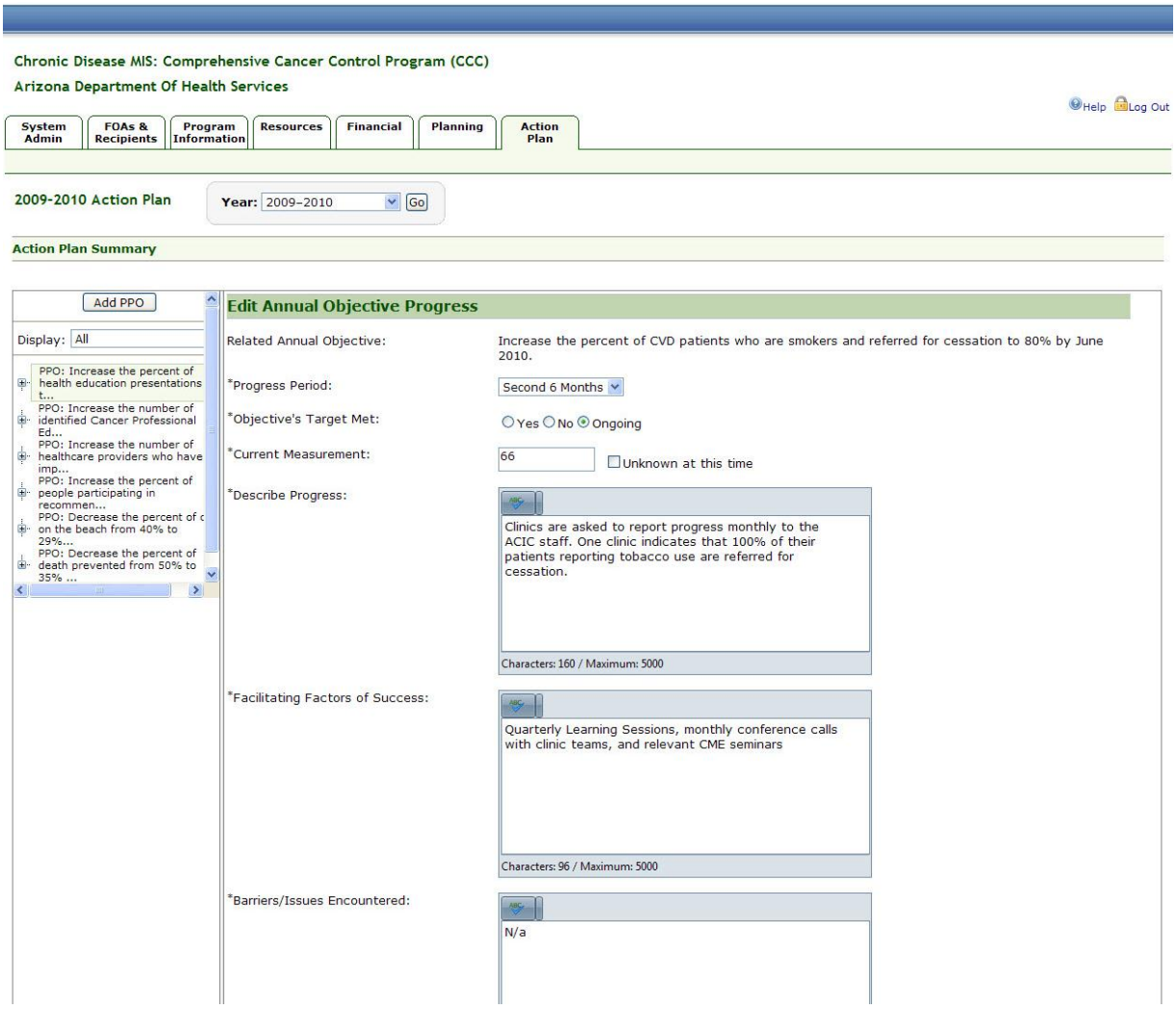


## View, edit or delete Annual Objective Progress:

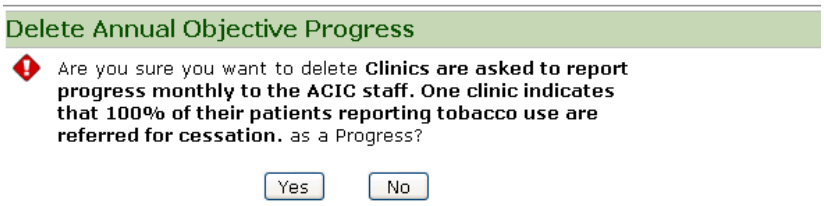
1. Click on the Project Period Objective in the navigation tree to display the Project Period Objective Summary.
2. Under the Annual Objective Progress, select the applicable link for the desired Progress Period to display the view, edit or delete page.




- **View** - information is "read-only" and cannot be changed.
- **Edit** - displays the existing information and allows modifications.

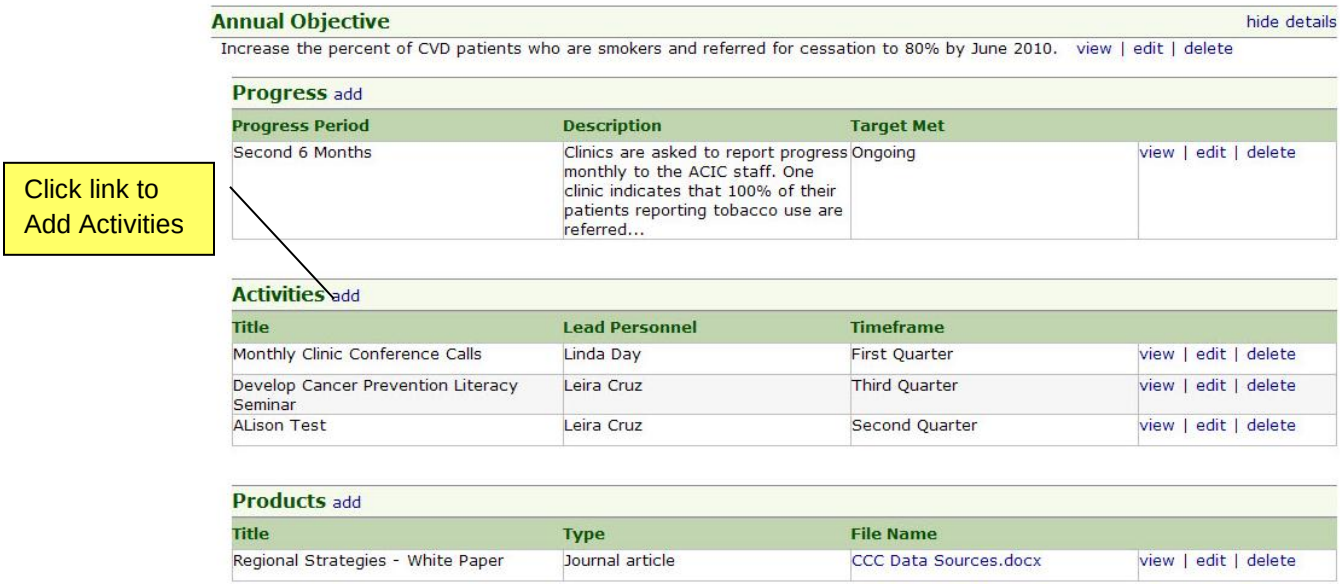


- **Delete -** displays a delete confirmation message. Select ‘Yes’ to delete the Annual Objective Progress or ‘No’ to cancel the delete action.

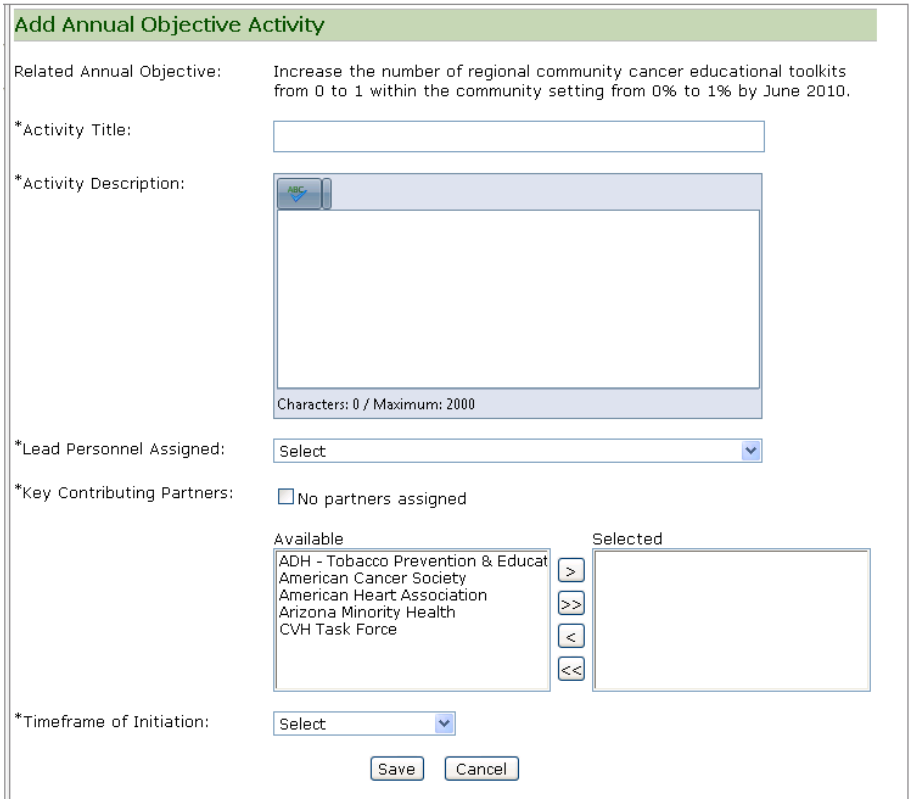


## Add Activity for an Annual Objective:

1. Select the Annual Objective from the navigation tree to display the annual objective in the Action Plan details section.
2. Click the Activities 'add' link to display the Add Activities page



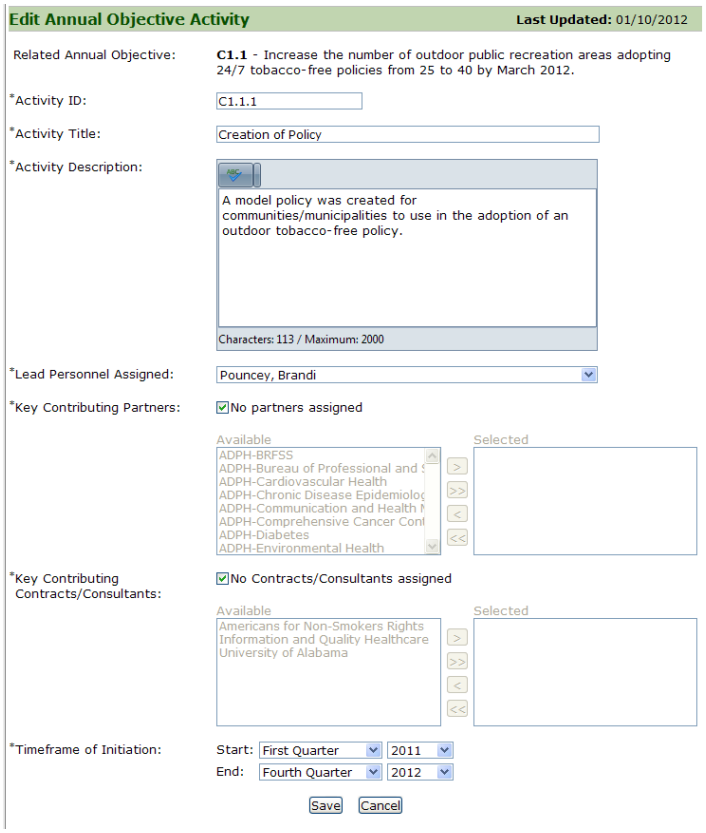

3. Complete the required fields to add the Annual Objective Activity. Please see the Action Plan field instructions at the end of this section for detailed information on adding each field.



View, edit or delete Annual Objective Activity:

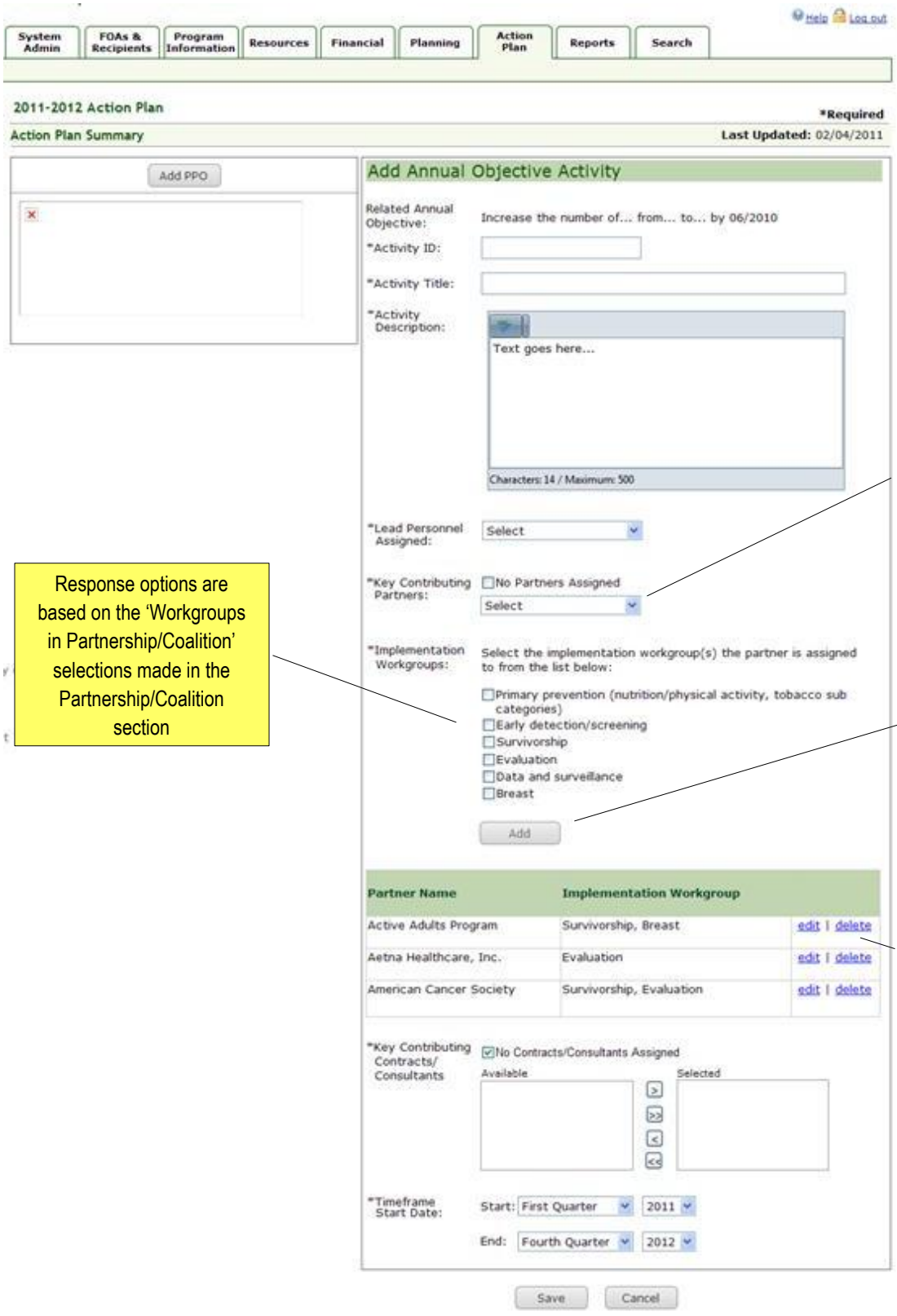
1. Select the Annual Objective from the navigation tree to display the annual objective in the Action Plan details section.
2. Under the Activities section, locate the activity to view, edit or delete.
3. Click the view, edit or delete link to display the applicable page.

- **View** - information is “read-only” and cannot be changed.
- **Edit** - displays the existing information and allows modifications.




- **Delete -** displays a delete confirmation message. Select 'Yes' to delete the Annual Objective Activity or 'No' to cancel the delete action.

## Action Plan – Activity Page




Click here to select the partner

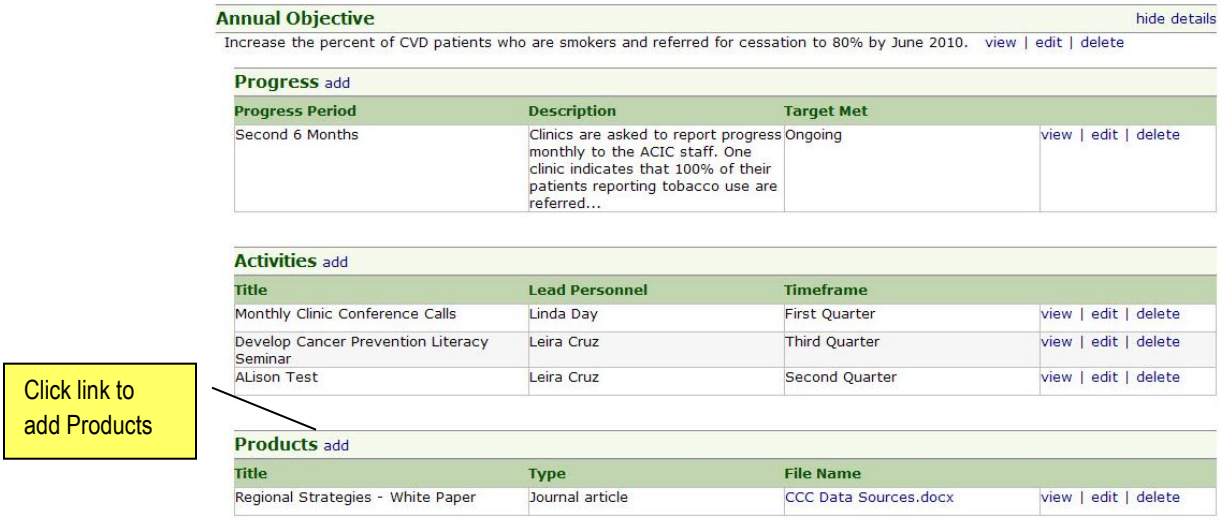
Response options are based on the 'Workgroups in Partnership/Coalition' selections made in the Partnership/Coalition section

Click the 'Add' button to update the table below with the partner information

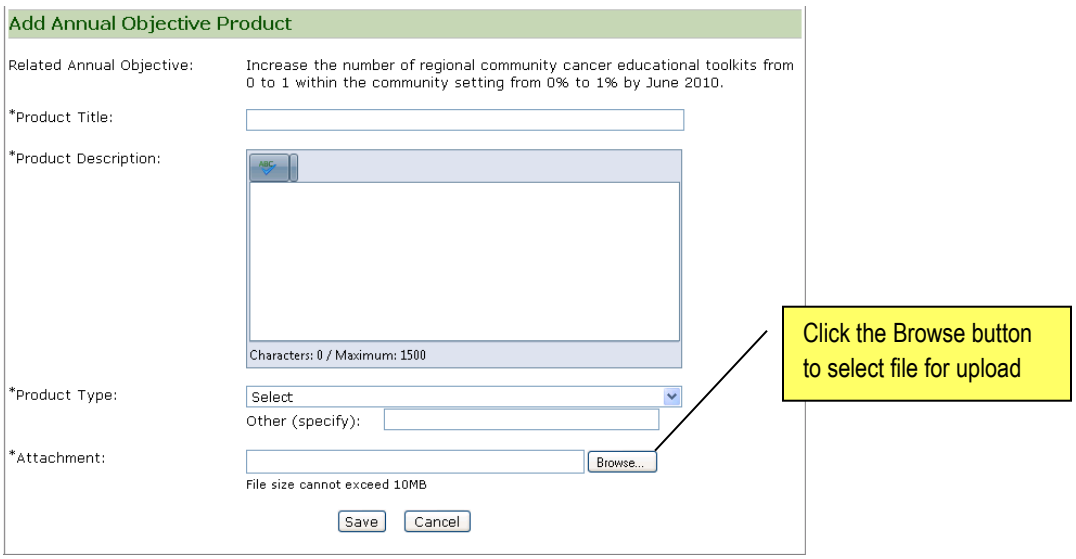
Select links to edit or delete the Partner

## Add a Product for an Annual Objective:

1. Select the Annual Objective from the navigation tree to display the annual objective in the Action Plan details section.
2. Click the Products 'add' link to display the Add Products page

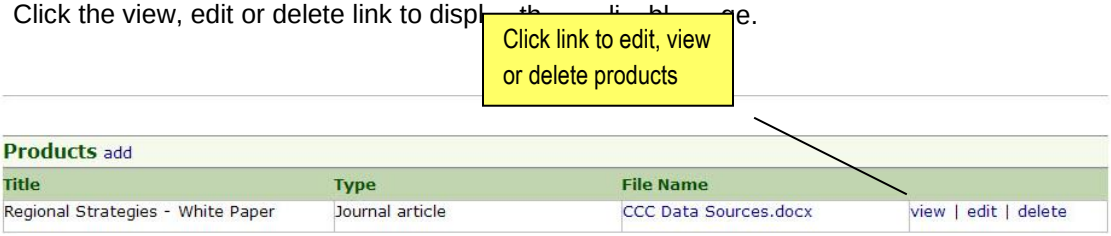



4. Complete the required fields to add the Annual Objective Product. Please see the Action Plan field instructions at the end of this section for detailed information on adding each field.

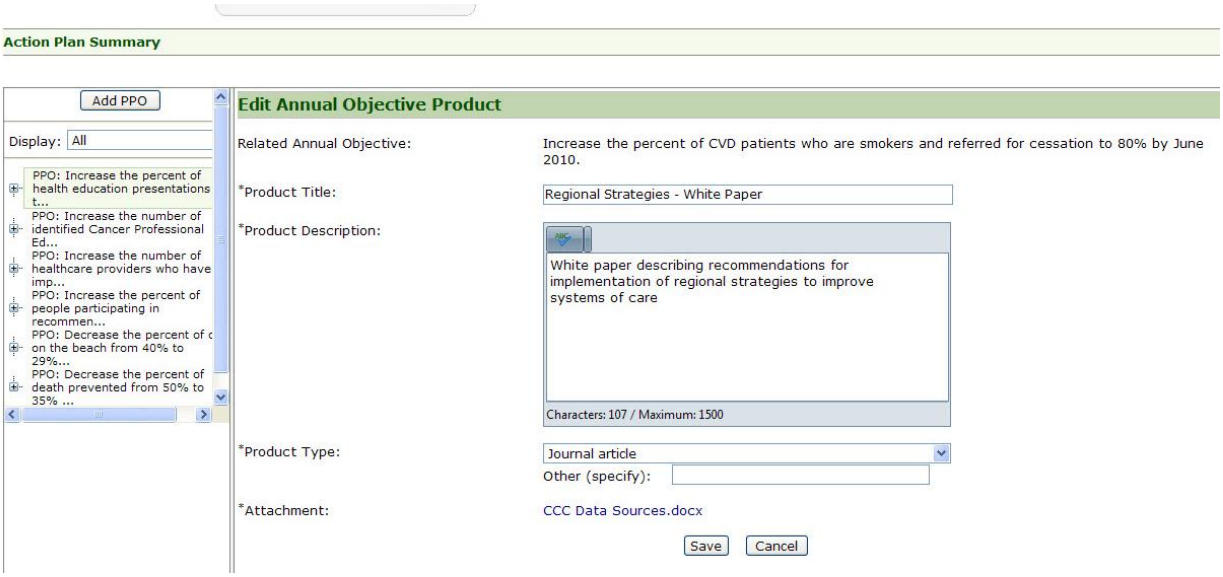


## View, edit or delete Annual Objective Products:

1. Select the Annual Objective from the navigation tree to display the annual objective in the Action Plan details section.
2. Under the Products section, locate the product to view, edit or delete.
3. Click the view, edit or delete link to disp[illegible]e.




- **View** - information is "read-only" and cannot be changed.
- **Edit -** displays the existing information and allows modifications.




- **Delete -** displays a delete confirmation message. Select 'Yes' to delete the Annual Objective Product or 'No' to cancel the delete action.

## Add/View/Edit/Project Period Objective

The pages for entering initial information and modifying existing project period objectives are identical. The only difference is that the Edit page displays the existing information while the fields in the page for entering initial information are blank. Use the Add page to enter initial information and the Edit page to modify existing information. The page for viewing information is the same as add and edit pages, however; you cannot change any information.

| Field/Section/Button | Instructions |
|---|---|
| **Programs Involved*** | Select the program(s) that will be involved in the project period objective.<br><br>*Note:* This field is available only for a Collaborative FOA. |
| **Related Program*** | Select the program related to the project period objective.<br><br>*Note:* You can make only one selection in this field.<br><br>For a CCC FOA, the available options are:<br>• National CCC Program<br>• Colorectal Cancer<br>• Ovarian Cancer<br>• Prostate Cancer<br>• Skin Cancer<br><br>If the related program goal is not in included in the list, select Other, and enter it in the Other text box. Maximum text for the Other field is 50 characters, about 10 words. |
| **Objective ID*** | Assign an objective ID or number to the Project Period Objective.<br><br>Maximum text is 15 characters. |
| **Related Program Goal*** | For all FOAs except for CCC, select the appropriate related program goal from the list.<br><br>For a CCC FOA, enter the related program goal in the text box. Maximum text 2000 characters, about 400 words.<br><br>For CTG and CTG National FOAs, if the related program goal is not in included in the list, select Other, and enter it in the Other text box. Maximum text for the Other field is 50 characters, about 10 words. |

**Priority Area***

Select the appropriate priority area(s) from the list. The priority areas displayed are determined by the FOA.

For options where you have to further specify the priority area or if a priority area is not included in the list, select Other, and enter it in the Other text box. Maximum text for the Other field is 50 characters, about 10 words.

For CTG and CTG National FOAs, if the priority area is not in included in the list, select Other, and enter it in the Other text box. Maximum text for the Other field is 50 characters, about 10 words.

**Cancer Focus***

Select the areas on which the cancer focuses.

*Note:* This field is available only for the CCC and CCC 1017 FOAs.

If the focus area is not in included in the list, select Other, and enter it in the Other text box. Maximum text for the Other field is 50 characters, about 10 words.

**Describe the objective and how it will impact the problem***

Enter a description for the objective and describe the impact that the objective will have on the problem that is addressed by the PPO.

Maximum text is 2000 characters, about 400 words.

**Measurement:**

The information you enter into this section creates the SMART Objective Statement.

**Direction of Change***

Select the direction of change that will be measured to indicate if you plan to increase, decrease, or maintain the figure.

**Unit of Measure***

Select the unit of measurement that will be used to measure the project period objective.

**Long Term Outcome Indicator***

Select the indicator that will be used for measuring the Project Period Objective.

*Note:* This field is available only if the FOA is Collaborative and the program involved is Tobacco Control.

**Baseline***

Enter the baseline figure for what will be measured in the text box.

| | |
|---|---|
| | Maximum text is 10 numeric digits.<br><br>If you do not know the baseline, select the Unknown check box. If you select Unknown, the Baseline field is not required. |
| **Target*** | Enter the target figure for what will be measured in the text box.<br><br>Maximum text is 10 numeric digits. |
| **Data Source*** | Select the desired data source from the list.<br><br>If the data source is not in included in the list, select Other, and enter it in the Other text box.<br><br>Maximum text for the *Other* field is 50 characters, about 10 words. |
| **Timeframe*** | Displays the start date and the end date for the annual objective.<br><br>CTG and CTG National FOAs:<br><br>*Click the calendar icon in the Start Date field to select the PPO start date and click the calendar icon in the End Date field to select the PPO end date.* |
| **Intermediate and Short Term Outcome** | This section is visible if Tobacco is the only response selected for Programs Involved. |
| **Measurements/Type*** | Indicate if this outcome measurement is intermediate or short by selecting the type from the drop-down list.<br><br>Note: This field is available only if the FOA is Collaborative and the program involved is Tobacco Control. |
| **Intermediate and Short Term Outcome Measurements/Target*** | Enter the target figure for the intermediate or short term outcome measurement in the text box. This field is available only if the FOA is Collaborative and the program involved is Tobacco Control. Maximum text is 10 numeric digits. |
| **Intermediate and Short Term Outcome Measurements/National Program Indicator*** | Select the indicator that will be used for measuring the intermediate or short term indicator. This field is available only if the FOA is Collaborative and the program involved is Tobacco Control. Maximum text is 10 numeric digits. |

| | |
|---|---|
| **Intermediate and Short Term Outcome Measurements/Data Sources*** | Select the desired data source from the list. If the data source is not in included in the list, select Other, and enter it in the Other text box. This field is available only if the FOA is Collaborative and the program involved is Tobacco Control. Maximum text for the Other field is 50 characters, about 10 words. |
| **Intermediate and Short Term Outcome Measurements/Save** | Click *Save* to save the information entered in the Intermediate and Short Term Outcome Measurements section. This field is available only if the FOA is Collaborative and the program involved is Tobacco Control. |
| **Intermediate and Short Term Outcome Measurements/Cancel** | Click *Cancel* to discard any information entered in the Intermediate and Short Term Outcome Measurements section. This field is available only if the FOA is Collaborative and the program involved is Tobacco Control. |
| **Intermediate and Short Term Outcome Measurements** | This section displays the information entered in the Intermediate and Short Term Outcome Measurements section. This field is available only if the FOA is Collaborative and the program involved is Tobacco Control. |
| **Timeframe*** | Displays the five-year time frame for the Project Period Objective.<br><br>CTG and CTG National FOAs:<br><br>*Click the calendar icon in the Start Date field to select the PPO start date and click the calendar icon in the End Date field to select the PPO end date.*<br><br>Note*: The PPO end date will display in the SMART statement.* |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Project Period Objective Summary. |

*= Required field

### Delete Project Period Objective

When deleting a project period objective, you will be asked to confirm your decision. A project period objective with associated progress and annual objective information cannot be deleted. You must first delete associated information before you can delete the project period objective. Once a project period objective is

deleted it is no longer available in the system. If a project period objective which is assigned to action plan activities is deleted, the project period objective will be removed from that action plan activity as well.

### Project Period Objective Progress

The Project Period Objective Progress section allows you to track and record the progress of the project period objective.

The following actions can be performed in the Progress section:

- *Add*: Click this link to add progress information.
- *View*: Click this link to view progress information.
- *Edit*: Click this link to edit information for existing progress information.
- *Delete*: Click this link to remove progress information.

### Add/View/Edit/Project Period Objective Progress Entry

The pages for entering initial information and modifying existing project period objective progress information are identical. The only difference is that the Edit page displays the existing information while the fields in the page for entering initial information are blank. Use the Add page to enter initial information and the Edit page to modify existing information. The page for viewing information is the same as the add and edit pages, however; you cannot change any information.

| Field/Section/Button | Instructions |
|---|---|
| **Related Project Period Objective Details** | Displays the related project period objective details in SMART format. |
| **Progress Period*** | Select the period for the project period objective progress, First six months or Second six months, from the drop-down list.<br><br>A progress period warning message will display if you select a time period ("First 6 months" or "Second 6 months") that is not within the current reporting period. The warning allows you to keep the selection you made or change it. |
| **Objective's Target Met*** | Indicate if the project period objective's target has been met, or not met, or still ongoing. |
| **Current Measurement*** | Enter the current measurement used for the progress information.<br><br>Maximum text is 10 numeric digits.<br><br>If you do not know the current measurement, select the Unknown check box. If you select Unknown, the Current Measurement field is not required. |

**Describe Progress***

Enter a description for the project period objective progress.

Maximum text is 3000 characters, about 600 words.

**Is this objective related to a PSE change?***

Specify by selecting Yes or No if the specific objective is related or not related to a Policy, System, and Environmental (PSE) change.

*Note:* This field is available only for the CCC 1017 and CCC 1205 FOAs.

**Status***

Select the status that best describes the objective.

**Policy Title***

Enter the title of your policy.

Maximum text is 300 characters, about 60 words.

**Estimated number of people reached***

Enter the estimated number of people reached by this objective in the format #, ###, ###, ###.

**Data Source**

Select all the data sources used in program planning, implementation, and evaluation.

If the desired data source is not included in the list, select Other, and enter the data in the Other text box.

Maximum text for the Other field is 50 characters, about 10 words.

**Most Recent Data Set Year**

For each data source selected, enter the most recent year of data available for each data source, for example, 2004. Year entered must be between 1990 and the current year.

**Facilitating Factors of Success***

Describe the factors that will facilitate the success of the project period objective.

Maximum text is 3000 characters, about 600 words.

**Barriers/Issues Encountered***

Describe the barriers or issues encountered in the process of achieving success.

Maximum text is 3000 characters, about 600 words.

| | |
|---|---|
| **Plans to Overcome Barriers/Issues Encountered*** | Describe the plans or strategy that you will use to overcome the barriers or issues encountered.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Unanticipated Outcomes Resulting from the Objective** | Describe any unanticipated outcomes that have resulted from the project period objective.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click Save, the system displays an error. Correct all errors and click Save again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Project Period Objective Summary page. |

*= Required field

### Delete Progress Period Objective Progress Information

When deleting project period objective progress information, you will be asked to confirm your decision. Once project period objective information is deleted it is no longer available in the system.

### Annual Objective Summary

The Annual Objective section describes an annual objective and the manner in which results will be achieved for the annual objective. The annual objective Summary section displays the annual objective information and associated progress information, activities, and products.

The following actions can be performed in the Annual Objective section:

- *View*: Click this link to view annual objective information.
- *Edit*: Click this link to edit information for an existing annual objective.
- *Delete*: Click this link to remove an annual objective.
- *Show/Hide Details*: Click this link or show or hide the details for an annual objective.

### Add/View/Edit/Annual Objective

The pages for entering initial information and modifying existing annual objective progress information are identical. The only difference is that the Edit page displays the existing information while the fields in the page for entering initial information are blank. Use the Add page to enter initial information and the Edit page to modify existing information. The page for viewing information is the same as add and edit pages, however; you cannot change any information.

| Field/Section/Button | Instructions |
|---|---|
| **Related Project Period Objective** | Displays the related project period objective in SMART format. |
| **Programs Involved*** | Select the programs involved in the annual objective. This field is displayed only for Collaborative FOAs.<br><br>For all FOAs except for Collaborative FOA, Programs Involved = Tobacco Control, enter the strategy that will be employed for the annual objective. Maximum text 2000 characters, about 400 words<br><br>For Collaborative FOA, Programs Involved = Tobacco Control, select the appropriate strategy from the list. |
| **Objective ID*** | Assign an objective ID or number to the annual objective. Maximum text is 15 characters. |
| **Related FOA Recipient Activity*** | Select the recipient activity or activities that are related to the annual objective. |
| **Related Program Goal*** | For all FOAs except for CCC, select the appropriate related program goal from the list.<br><br>For a CCC FOA, enter the related program goal in the text box. Maximum text 2000 characters, about 400 words. |
| **Strategy*** | Select the strategy or strategies related to the annual objective.<br><br>This field is available only for CCC, CCC 1017, CCC 1205, and Collaborative FOAs.<br><br>If the related strategy is not in included in the list, select Other, and enter it in the Other text box. Maximum text for the Other field is 50 characters, about 10 words.<br><br>You can also specify a strategy under each section by selecting the Specify option and entering a strategy. Maximum text for the Specify field is 50 characters, about 10 words. |
| **Related Strategies*** | Select the appropriate related strategy (ies) from the list.<br><br>For options where you have to further specify the related strategy enter it in the |

Specify text box. Maximum text for the Specify field is 50 characters, about 10 words.

If the related strategy is not in included in the list, select Other, and enter it in the Other text box. Maximum text for the Other field is 50 characters, about 10 words.

This field is available only for CTG FOA.

**Identify the Rationale/Approach for the Strategy***

Select the rationale or approach that will be used for the strategy.

The options displayed in the drop-down list are determined by the FOA.

*Note:* CCC, CCC 1017, and CCC 1205 FOAs:

- If the rationale/approach is not in included in the list, enter the information in the Other Sources text box. Maximum text for the *Other* Sources field is 100 characters, about 20 words.
- If you want to specify your own program, enter the information in your own program text box. Maximum text for the *Other* field is 100 characters, about 20 words.

**Describe the objective and how it will impact the problem***

Enter a description for the objective and describe the impact that the objective will have on the problem that is addressed by the annual objective.

Maximum text is 2000 characters, about 400 words.

**Scope***

Select the scope for the annual objective.

*Note:* This field is available only for CCC, CCC 1017, and CCC 1205 FOAs.

**Level of Change***

Select the level of change that will be addressed by the annual objective.

*Note:* This field is available only for CCC, CCC 1017, and CCC 1205 FOAs.

If the level of change is not in included in the list, enter the information in the Other text box. Maximum text for the *Other* field is 100 characters, about 20 words.

**Type of Change***

Select the level of change that will be addressed by the annual objective. If the type of change selected is Policy, the system displays more options to choose from.

*Note:* This field is available only for CCC, CCC 1017, and CCC 1205 FOAs.

If the type of change is not included in the list, enter the information in Other text box. Maximum text for the *Other* field is 100 characters, about 20 words.

| | |
|---|---|
| **Cross-Cutting Issues*** | Select the cross-cutting options.<br><br>*Note:* This field is available only for CCC and CCC 1017 FOAs.<br><br>If the desire cross-cutting issue is not in included in the list, enter the information in the Other text box. Maximum text for the Other field is 100 characters, about 20 words. |
| **Setting*** | Select the setting for the annual objective from the list.<br><br>For CCC 1017, CTG and CTG - National FOAs: If the desired setting is not included in the list, select *Other (specify)*, and enter it in the Other text box. Maximum text for the Other field is 100 characters, about 20 words. |
| **For innovative or other strategy, describe the evidence/practice base for the strategy** | If you selected or specified an innovative or Other strategy in the Related Strategies field, describe in detail the evidence or practice used as the basis for the strategy. Maximum text is 2000 characters, about 400 words.<br><br>This field is available only for CTG FOA. |
| **Population Focus*** | Select the type of population on which the annual objective focuses. You can select General Population as a whole or select Specific Population and then specify the population by selecting all that apply.<br><br>If the desired population focus for a particular section is not in included in the list, select *Other (specify)*, and enter it in the Other text box. Maximum text for the Other field is 100 characters, about 20 words.<br><br>You can enter more population information, if necessary, in the Additional Population Details field. Maximum text for the Additional Population Details field is 500 characters, about 100 words. |
| **Direction of Change*** | Select the direction of change that will be measured and indicate if you plan to increase, decrease, or maintain the objective. |
| **Unit of Measurement*** | Select the unit of measurement that will be used to measure the annual objective. |
| **What will be measured*** | Enter what will be measured in the annual objective in the text box.<br><br>Maximum text for the Other field is 300 characters, about 60 words. |

| | |
|---|---|
| **Baseline*** | Enter the baseline figure for what will be measured in the text box.<br><br>Maximum text is 20 numeric digits.<br><br>If you do not know the baseline, select the Unknown check box. If you select Unknown, the Baseline field is not required. |
| **Target*** | Enter the target figure for what will be measured in the text box.<br><br>Maximum text is 20 numeric digits. |
| **Data Source*** | Select the desired data source from the list.<br><br>If the data source is not in included in the list, select *Other (specify)*, and enter it in the Other text box. Maximum text for the Other field is 100 characters, about 20 words. |
| **Timeframe*** | Displays the one-year time frame for the annual objective.<br><br>CTG and CTG - National FOAs:<br><br>*Click the calendar icon in the Start Date field to select the PPO start date and click the calendar icon in the End Date field to select the PPO end date.*<br><br>Note*: The annual objective end date will display in the objective SMART statement.* |
| **Describe Revisions** | When editing an AO, enter notes or comments for the revision.<br><br>Maximum text is 2000 characters, about 400 words. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click *Save*, the system displays an error. Correct all errors and click Save again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Action Plan Summary page. |

*= Required field

## Delete Annual Objective

When deleting an annual objective, you will be asked to confirm your decision. An annual objective with associated progress information, activities, and products cannot be deleted. You must first delete associated information before you can delete the annual objective. Once an annual objective is deleted it is no longer available in the system.

### View Objective History

You can view the details of changes that have been made to an annual objective by clicking the *View History* link when viewing the annual objective.

| Column | Description |
|---|---|
| **Date of change** | This column displays the date a change was made to the annual objective. |
| **Updated by** | This column displays the name of the user who made the change to the annual objective. |
| **Explanation** | This column displays the description of the change that was made to the annual objective. |
| **Back** | Click Close to close the View Objective History window and display the Project Period Objective Summary page. |

### Annual Objective Progress

The Annual Objective Progress section allows you to track and record progress information for an annual objective.

The following actions can be performed in the Progress section:

- *Add*: Click this link to add progress information.
- *View*: Click this link to view progress information.
- *Edit*: Click this link to edit information for existing progress information.
- *Delete*: Click this link to remove progress information.

### Add/View/Edit/Annual Objective Progress Entry

The pages for entering initial information and modifying existing Annual Objective progress information are identical. The only difference is that the Edit page displays the existing information while the fields in the

page for entering initial information are blank. Use the Add page to enter initial information and the Edit page to modify existing information. The page for viewing information is the same as the add and edit pages, however; you cannot change any information.

| Field/Section/Button | Instructions |
|---|---|
| **Related Project Period Objective** | Displays the project period objective associated with this annual objective in SMART format. |
| **Progress Period*** | Select the period for the annual objective progress, First six months or Second six months, from the drop-down list.<br><br>A progress period warning message will display if you select a time period ("First 6 months" or "Second 6 months") that is not within the current reporting period. The warning allows you to keep the selection you made or change it. |
| **Objective's Target Met*** | Indicate if the annual objective's target has been met, or not met, or still ongoing. |
| **Current Measurement*** | Enter the current measurement used for the progress information.<br><br>Maximum text is 10 numeric digits.<br><br>If you do not know the current measurement, select the Unknown check box. If you select Unknown, the Current Measurement field is not required. |
| **Describe Progress*** | Enter a description for the annual objective progress.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Describe specific partner contributions including activities that supported this progress*** | Describe how the partner's contributions have supported the annual objective's progress. Be sure to include activities.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Is this objective related to a PSE change?*** | Specify by selecting *Yes* or *No* if the specific annual objective progress is related or not related to a Policy, System, and Environmental (PSE) change.<br><br>*Note:* This field is available only for CCC 1017 and CCC 1205 FOAs. |

| | |
|---|---|
| **Status*** | Select the status that best describes the objective. |
| **Policy Title*** | Enter the title of your policy.<br>Maximum text is 300 characters, about 60 words. |
| **Estimated number of people reached*** | Enter the estimated number of people reached by this objective in the format #, ###, ###, ###. |
| **Data Source** | Select all the data sources used in program planning, implementation, and evaluation.<br>If the desired data source is not included in the list, select Other, and enter the data in the Other text box.<br>Maximum text for the Other field is 50 characters, about 10 words. |
| **Most Recent Data Set Year** | For each data source selected, enter the most recent year of data available for each data source, for example, 2004. Year entered must be between 1990 and the current year. |
| **Facilitating Factors of Success*** | Describe the factors that will facilitate the success of the annual objective.<br>Maximum text is 5000 characters, about 1000 words. |
| **Barriers/Issues Encountered*** | Describe the barriers or issues encountered in the process of achieving success.<br>Maximum text is 5000 characters, about 1000 words. |
| **Plans to Overcome Barriers/Issues Encountered*** | Describe the plans or strategy that you will use to overcome the barriers or issues encountered.<br>Maximum text is 5000 characters, about 1000 words. |
| **Unanticipated Outcomes Resulting from the Objective** | Describe any unanticipated outcomes that have resulted from the project period objective.<br>Maximum text is 5000 characters, about 1000 words. |

| | |
|---|---|
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Project Period Objective Summary page. |

*= Required field

### Delete Annual Objective Progress Information

When deleting annual objective progress information, you will be asked to confirm your decision. Once annual objective information is deleted it is no longer available in the system.

### Activities

Use the Activities section to add activities to your annual objective and track activity information.

*Note:* You can add up to four activities for an annual objective.

The following actions can be performed in the Activities section:

- *Add:* Click this link to add an activity for the objective.
- *View:* Click this link to view the activity.
- *Edit:* Click this link to edit the activity.
- *Delete:* Click this link to delete the activity.

### Add/Edit/View Activities

The pages for entering initial information and modifying existing activities information are identical. The only difference is that the *Edit* page displays the existing information while the fields in the page for entering initial information are blank. Use the *Add* page to enter initial information and the *Edit* page to modify existing information. The page for viewing information is the same as add and edit pages, however; you cannot change any information.

| Field/Section/Button | Instructions |
|---|---|
| **Related Annual Objective** | The system displays the name, status, and time frame of the related objective to which this activity is being added. This information is view only and cannot be modified. |

| | |
|---|---|
| **Activity ID*** | Assign an ID or number to the activity. Maximum text is 15 characters. |
| **Activity Title*** | Enter a title for the activity. For example, Develop Training Program.<br>Maximum is 200 alphanumeric characters, about 40 words. |
| **Activity Description*** | Enter a concise description for the activity.<br>Maximum is 2000 characters, about 400 words. |
| **Lead Personnel Assigned*** | Select the lead personnel for this activity from the list of active personnel displayed in the list.<br>The personnel listed in this list are from the active personnel in the Resources section. Any changes to personnel will be reflected in this section. |
| **Key Contributing Partners*** | Select the partners assigned to this activity from the Available list and move them to the Selected list. Any number of partners can be selected.<br>The partners listed in this section are pulled from the partners you entered in the Resources section. Any changes to partners will be reflected in this section.<br>If no contributing partners have been assigned to this activity, select the *No Partners Assigned* check box. |
| **Key Contributing Contracts/Consultants Assigned*** | Select the contracts or consultants assigned to this activity from the Available list and move them to the Selected list. Any number of contracts/consultants can be selected.<br>The contracts/consultants listed in this section are pulled from the contracts/consultants you entered in the Resources section. Any changes to contracts/consultants will be reflected in this section.<br>If no contributing contracts/consultants have been assigned to this activity, select the *No Contracts/Consultants Assigned* check box. |
| **Implementation Workgroups*** | Select at least one implementation workgroup for each partner selected for an activity. |
| **Describe community input beyond your Policy Taskforce/Workgroup** | Describe in details the ways that the community has contributed to the activity beyond your Policy Taskforce/Workgroup and partners.<br>Maximum is 5000 alphanumeric characters, about 1000 words. |

**and partners***

| | |
|---|---|
| **Primary Contribution*** | For each key contributing contract/consultant, select the area in which the contract/consultant has contributed to the activity.<br><br>If the desired area is not included in the list, select *Other*, and enter the description in the *Other* text box.<br><br>Maximum text for the *Other* field is 50 characters, about 10 words. |
| **Timeframe*** | Select the time frame of initiation for the activity from the drop-down lists.<br><br>In the Start drop-down field, select the quarter that starts the time frame of initiation for the activity — first, second, third, or fourth quarter and then select the year from the drop-down list.<br><br>In the End drop-down field, select the quarter that ends the time frame of initiation for the activity — first, second, third, or fourth quarter and then select the year from the drop-down list. |
| **Save** | Click *Save* to save the information you entered. The system saves the information and returns you to the Project Period Objective Summary page.<br><br>If any fields on the page are incomplete or invalid, the system displays an error. Correct all invalid fields and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and display the Project Period Objective Summary page. |

*= Required field

## Delete Activity

When deleting an activity, you will be asked to confirm your decision. Once an activity is deleted it is no longer available in the system.

*Note*: Activities with a Performance Monitoring Rating cannot be deleted. Contact your Project Officer if you need to delete an activity that has a Performance Monitoring Rating.

## Products

Products are any outputs created as a result of performing or achieving an objective. Products may include journal articles, policy documents, survey instruments, etc.

The following actions can be performed in the Products section:

- *Add:* Click this link to add product information for an objective.

- *View:* Click this link to view a product.
- *Edit:* Click this link to edit product information.
- *Delete:* Click this link to delete a product.
- *File Name:* Click this link to display to open or save a product attachment.

### Add/Edit/View Product

The pages for entering initial information and modifying existing product information are identical. The only difference is that the *Edit* page displays the existing information for the product while the fields in the page for adding initial information are blank. Use the *Add* page to enter initial information and the Edit page to modify existing information. Use the View page to view objective product information.

| Field/Section/Button | Instructions |
|---|---|
| **Related Annual Objective** | The system displays the name, status, and time frame of the related objective to which this product is being added. This information is view only and cannot be modified. |
| **Product Title*** | Enter a descriptive title for the product.<br>Maximum is 200 characters, about 40 words. |
| **Product Description*** | Enter a description for the product.<br>Maximum is 1500 characters, about 300 words. |
| **Product Type** | Select a product type from the drop-down list.<br>If the product type is not in included in the list, select *Other (specify)*, and enter it in the *Other* text box. Maximum text for the Other field is 100 characters, about 20 words. |
| **Attachment** | Enter the complete path for the document that you want to attach or click *Browse* to navigate to the location where the document is saved, and select the document.<br>To edit an attached file, you should edit the copy of the file on your computer, and then you must delete the attached file and then upload it again.<br>Maximum text is 200 alphanumeric characters. |

| | |
|---|---|
| **Save** | Click *Save* to save the information you entered. The system saves the information and returns you to the Project Period Objective Summary page.<br><br>If any fields on the page are incomplete or invalid, the system displays an error. Correct all invalid fields and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and display the Project Period Objective Summary page. |

*= Required field

## Delete Product

When deleting a product, you will be asked to confirm your decision. Once a product is deleted it is no longer available in the system.

### Viewing and Printing a Report

When you select a report to run by clicking the *Print Action Plan Report* or *Print Action Plan Report Summary* link, you can click the *My Reports* link at the top right of the page to open a pop-up window and check the status of the report(s) being generated. While the report is being generated, you can continue working in the system and access other pages in the system without disrupting the progress of the report being generated.

**Notes:**

- The *My Reports* link is available for all tabs and reporting years.
- Reports are specific to the user, meaning you can view only the reports that you select to run.
- If you run the same report multiple times, the most recently generated report is displayed at the top of the list on the report pop-up page.
- A generated report is available for 18 hours from the submitted date and time, or until you click the *Download* link for the report.

The pop-up window displays the information for each report generated in the following columns:

| Column/Link | Description/Instructions |
|---|---|
| **Report** | The name of the report. For Interim and Annual reports, this column also indicates if the report is in the draft state or finalized. Click on the report name to open the report or save the report to a location on your computer. |
| **Submitted** | Indicates the date and time the request to run the report was submitted. |

**Available Until** Indicates the date and time during which the request will be displayed in the pop-up window. After the displayed date and time, the report will no longer be available. To view the report after this date, you must run the report again.

**[Status]** Indicates the status of the report, (e.g. processing) the report format (PDF), and the size. When the report is ready, this column displays a *Download* link, which you can click to view the report or download it to a location on your computer.

**Close** Click this link to close the pop-up window.

# Community (HCP Achieve, SAH and PHC; CTG/CTG National FOAs only)

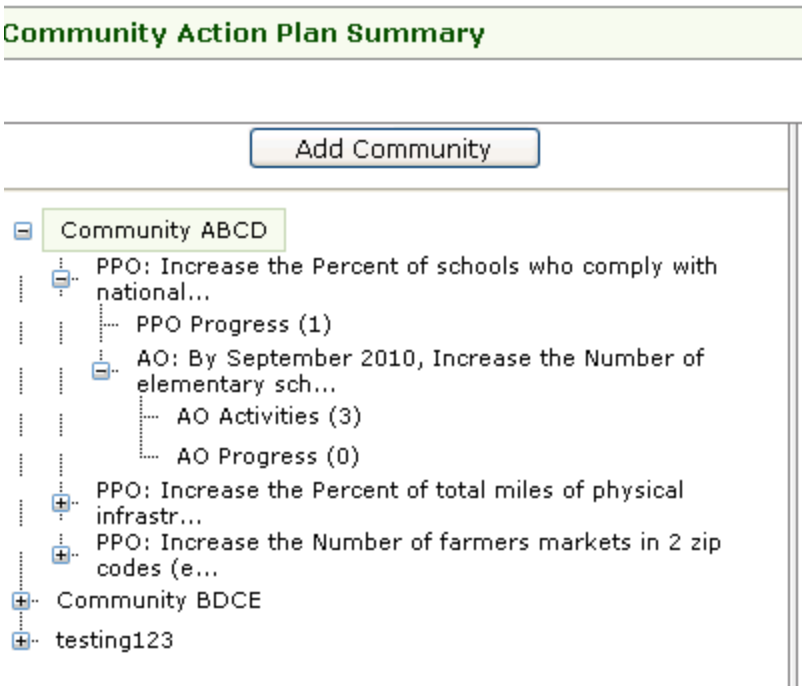
**Introduction:** The Community tab is used by the HCP ACHIEVE, SAH and PHC FOAs. Community includes the following sections:

- **Community Action Plan (CAP)**- used to document the action plan for the communities associated with the grantee organization.
- **Assessment** – used to document information on the assessments conducted.
- **CHANGE Tool –** used to document CHANGE assessment information

## Community Action Plan Summary (CAPs)

The Community Action plan uses a hierarchical design that is similar to the Action Plan. The top level of the hierarchy is the Community followed by the Project Period Objective and the Annual Objective:

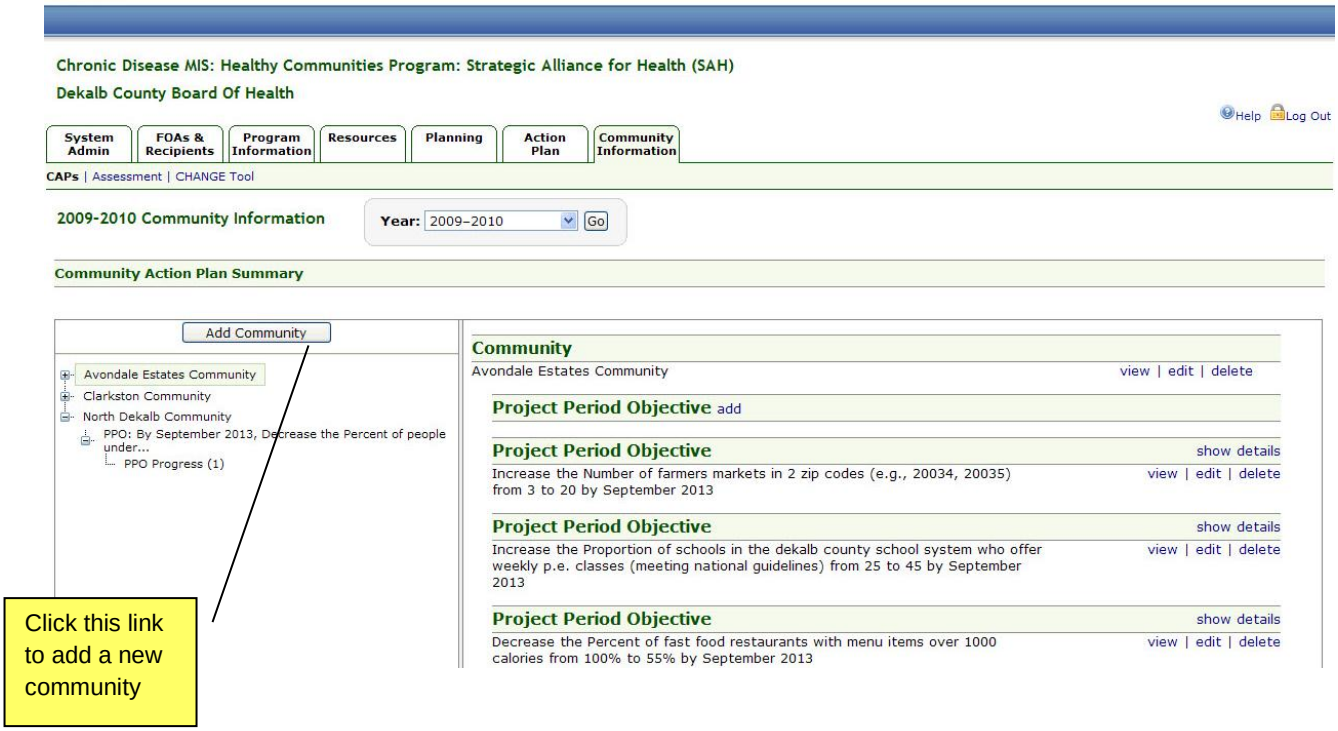
1. Community
   1.1. Project Period Objective
      1.1.1.Project Period Objective Progress'
      1.1.2.Annual Objective
         1.1.2.1. Annual Objective Progress
         1.1.2.2. Activities.



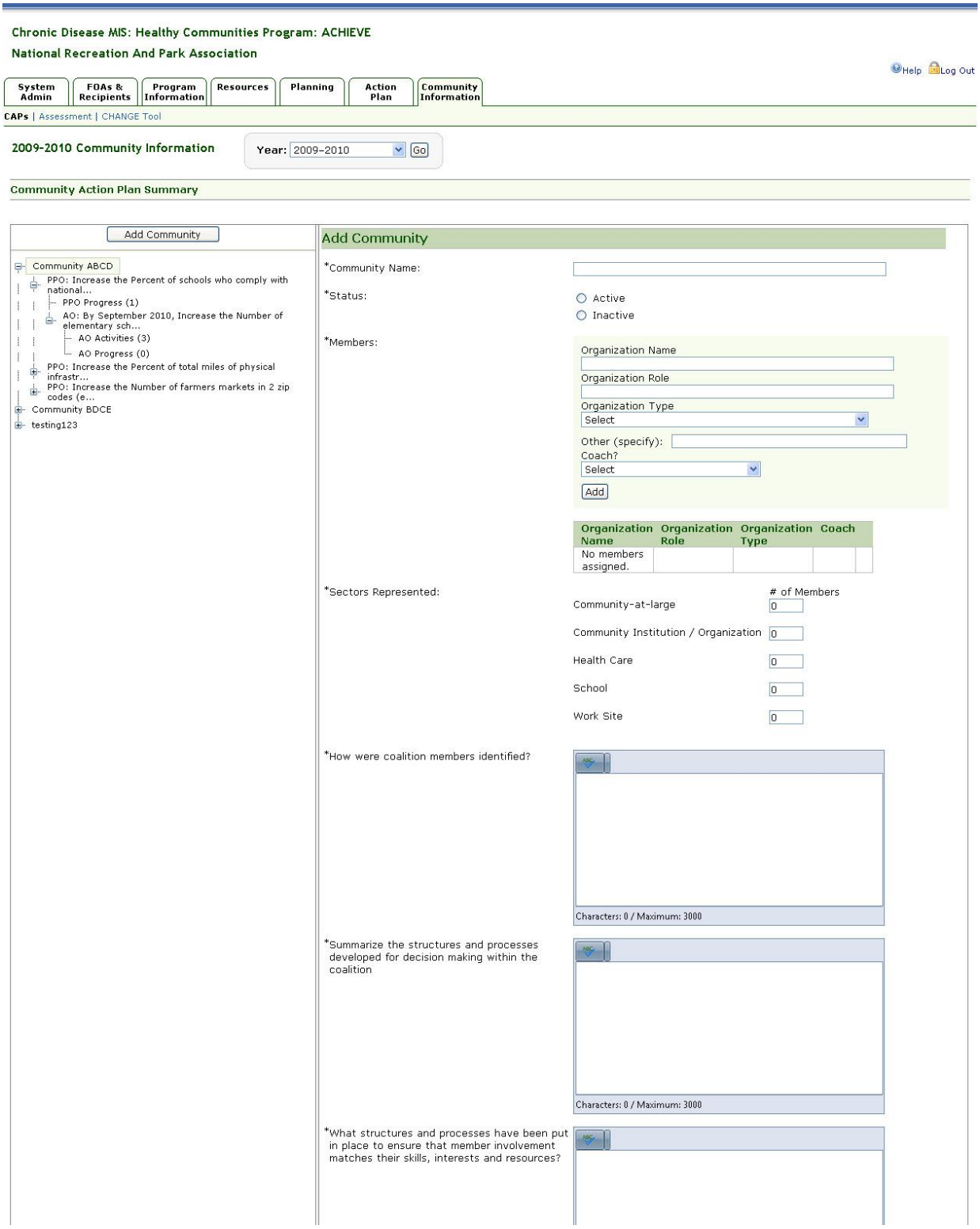
## Add Community

To add a community:

1. Select the 'Add Community' link from the CAP Summary page to display the add page in the action plan detail section.

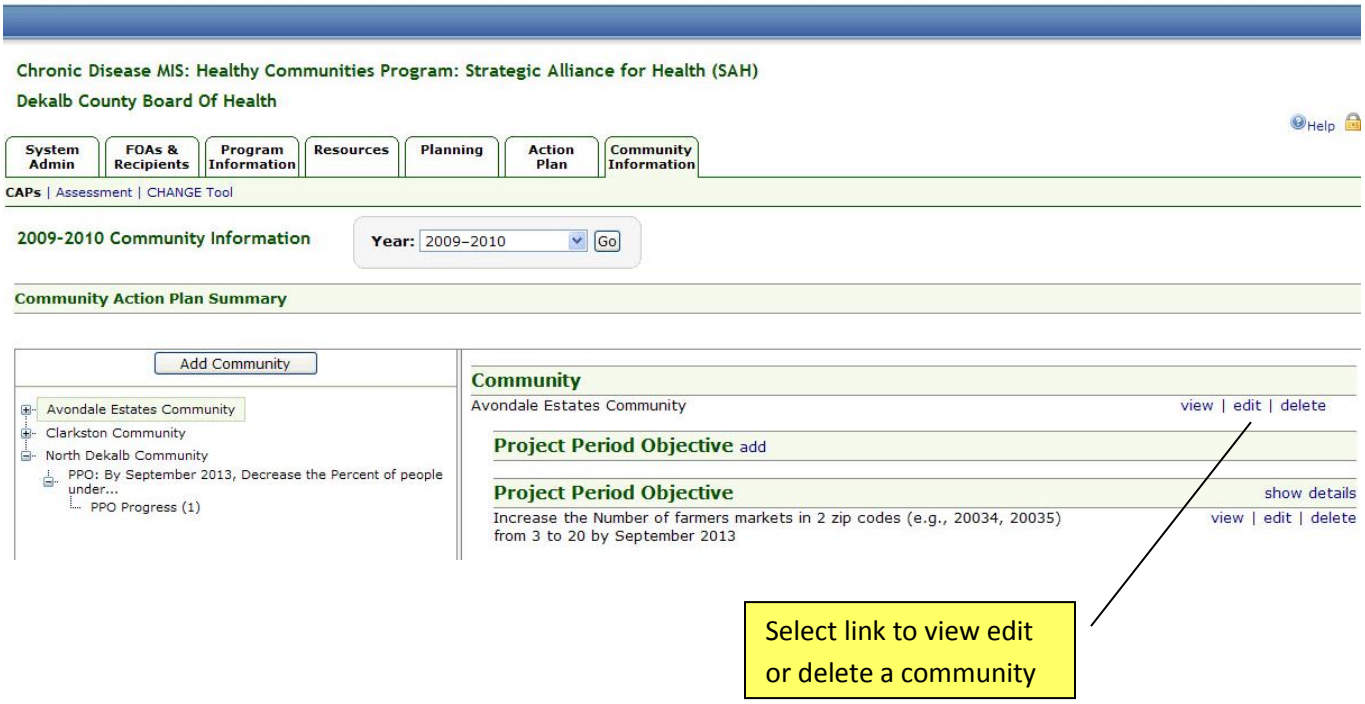



2. Complete the fields required to add the community
3. Click Save

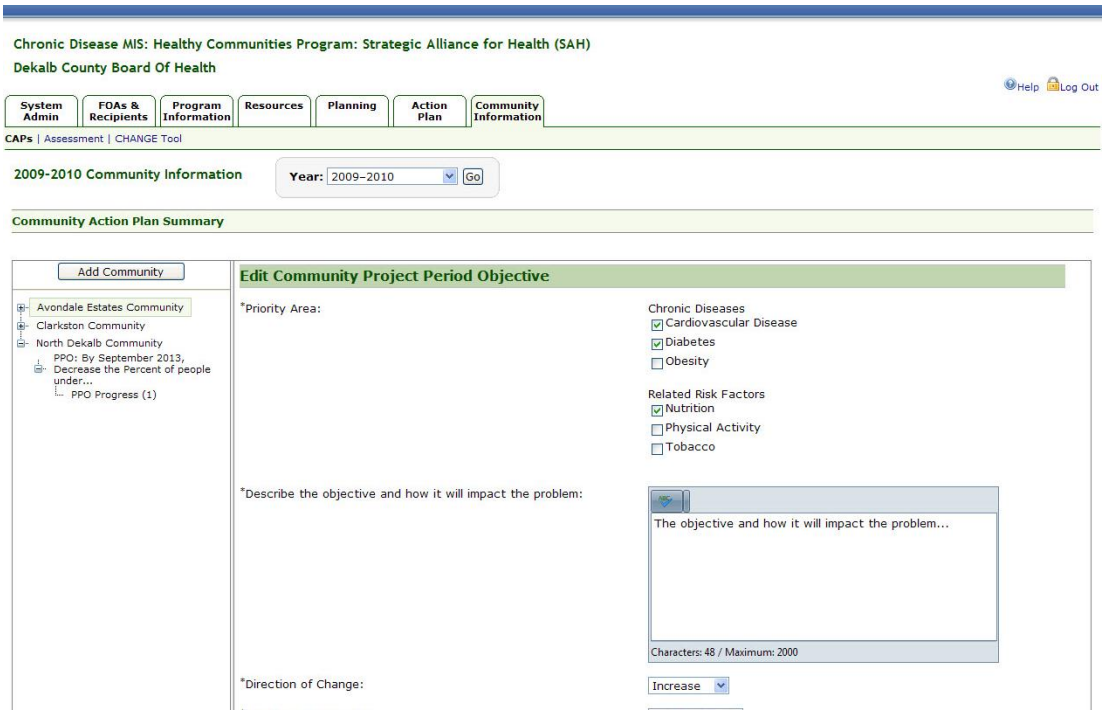

Chronic Disease MIS: Healthy Communities Program: ACHIEVE
National Recreation And Park Association
Help
Log Out
System Admin
FOAs & Recipients
Program Information
Resources
Planning
Action Plan
Community Information
CAPs | Assessment | CHANGE Tool
2009-2010 Community Information
Year: 2009-2010
Go
Community Action Plan Summary
Add Community
Community ABCD
PPO: Increase the Percent of schools who comply with national...
PPO Progress (1)
AO: By September 2010, Increase the Number of elementary sch...
AO Activities (3)
AO Progress (0)
PPO: Increase the Percent of total miles of physical infrastr...
PPO: Increase the Number of farmers markets in 2 zip codes (e...
Community BDCE
testing123
Add Community
*Community Name:
*Status:
Active
Inactive
*Members:
Organization Name
Organization Role
Organization Type
Select
Other (specify):
Coach?
Select
Add
Organization Name
Organization Role
Organization Type
Coach
No members assigned.
*Sectors Represented:
# of Members
Community-at-large
0
Community Institution / Organization
0
Health Care
0
School
0
Work Site
0
*How were coalition members identified?
Characters: 0 / Maximum: 3000
*Summarize the structures and processes developed for decision making within the coalition
Characters: 0 / Maximum: 3000
*What structures and processes have been put in place to ensure that member involvement matches their skills, interests and resources?

## Edit Community

1. Select the 'edit' link for the community in the action plan details section

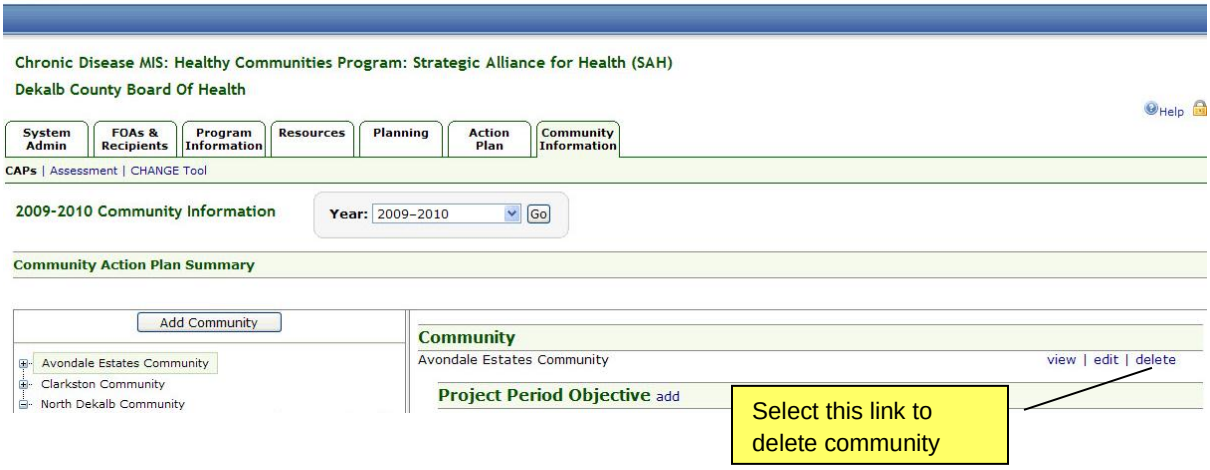



2. Click in the field to be edited and type the new data or select a new list value.



## Delete Community

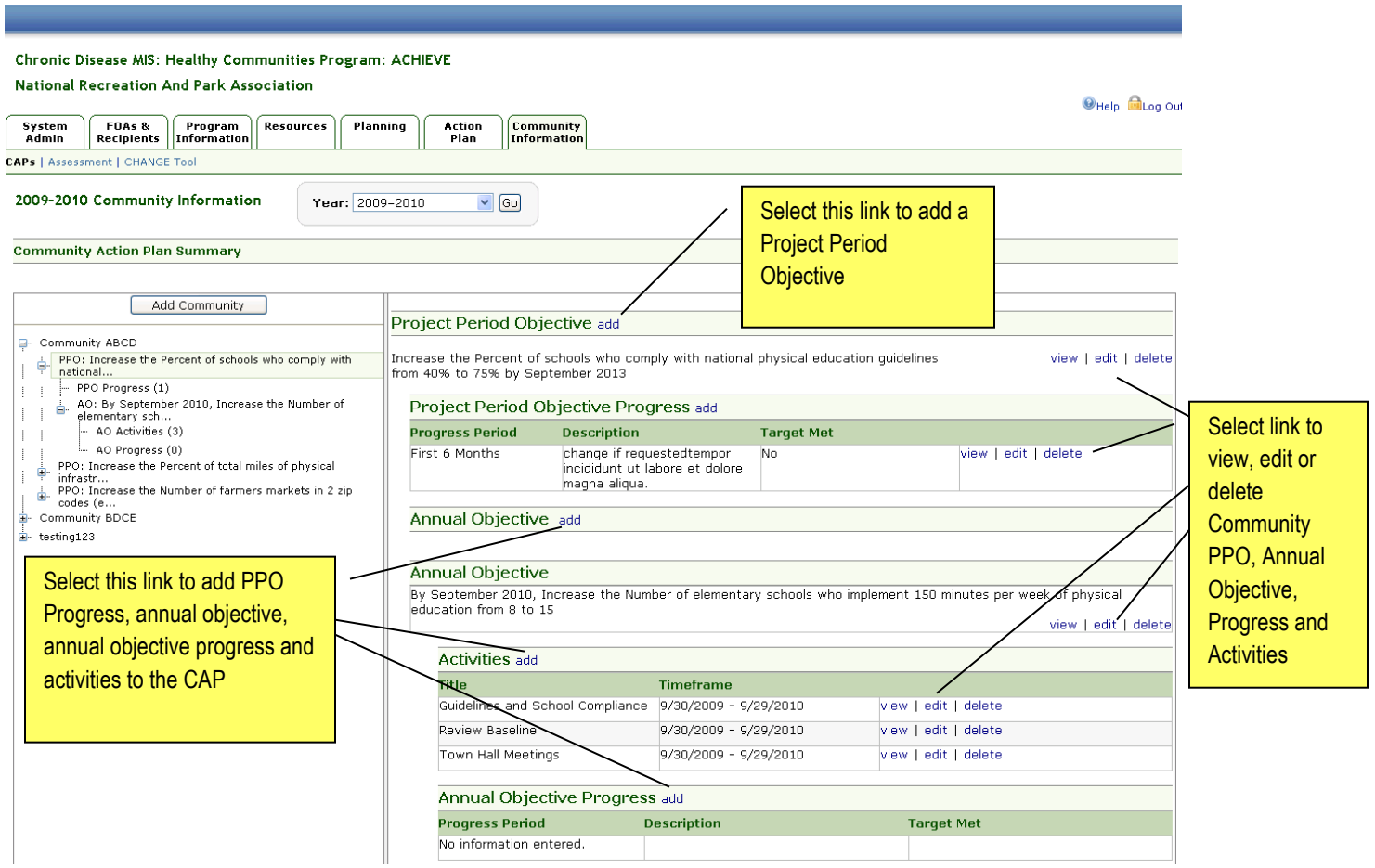
1. Select the ‘delete ‘ link for the community in the Action Plan details section




2. A delete confirmation message will be displayed. Select ‘yes’ button to confirm the delete or no to cancel.

## CAP - Project Period Progress, Annual Objective, Annual Objective Progress, Activities

The steps for adding the CAP project period objective, annual objective, annual objective progress and activities are the same as the Action Plan. The fields listed in each section will be specific to the FOA. Select the applicable link from the CAP Summary. Refer to the Action Plan section for required steps.



# Community Action Plan Field Instructions

| Field/Section/Button | Instructions |
|---|---|
| **Community Name*** | Enter the name of the community.<br>Maximum text 200 characters, about 40 words |
| **Year Funded*** | Enter the four-digit year for which the community is funded.<br>This field is displayed for only ACHIEVE/PHC FOAs.<br>Maximum text four numeric digits. |
| **Status*** | Indicate if the community is active or inactive. This field is required only for ACHIEVE/PHC FOA. |
| **Organization Name*** | Enter the organization name for the members of the community.<br>Maximum text 200 characters, about 40 words. |
| **Organization Role*** | Enter the organization role for members in the community.<br>Maximum text 200 characters, about 40 words. |
| **Organization Type*** | Select the organization type for the members from the drop-down list.<br>If the organization type is not in included in the list, select Other, and enter it in the Other text box. Maximum text for the Other field is 50 characters, about 10 words. |
| **Coach?*** | Indicate by selecting Yes or No if this member is a coach or not. |
| **Add** | Click the *Add* button to save the added member information. The saved information is displayed in a table below the Add button.<br>If any fields in the Members section are incomplete or invalid, when you click *Add*, the system displays an error. Correct all errors and click *Add* gain |
| **Edit** | Click the *Edit* button to save existing member information. |

| | |
|---|---|
| **Delete** | Click the *Delete* button to delete existing member information. |
| **Sectors Represented*** | Enter the number of members that represent the sectors displayed for your FOA.<br><br>Maximum text for each text box 10 numeric digits. |
| **How were coalition members identified?*** | Describe in detail how coalition members were identified for this community.<br><br>Maximum text 3000 characters, about 600 words. |
| **Summarize the structures and processes developed for decision making within the community*** | Provide a detailed summary of the structures and processes that were developed for decision making within this community.<br><br>Maximum text 3000 characters, about 600 words. |
| **What structures and processes have been put in place to ensure that member involvement matches their skills, interests, and resources?*** | Describe in detail the structures and processes implemented in this community that ensure that member involvement matches their skills, interests, and resources.<br><br>Maximum text 3000 characters, about 600 words. |
| **Summarize structures and processes for communication within the coalition*** | Provide a detailed summary of the structures and processes that ensure effective communication within the coalition.<br><br>Maximum text 3000 characters, about 600 words. |
| **Describe the collaboration(s) that contributed most to local-level success*** | Describe in detail the collaboration(s) that most contributed to the success of this community on a local level.<br><br>Maximum text 3000 characters, about 600 words. |
| **Describe any collaboration(s) that hindered local-level progress/success*** | Describe in detail the collaboration(s) that hindered the progress or success of this community on a local level.<br><br>Maximum text 3000 characters, about 600 words. |

| | |
|---|---|
| **Describe the process and rationale for prioritization of the community action plan*** | Describe in detail the process and rationale that you used for prioritizing the community action plan.<br><br>Maximum text 3000 characters, about 600 words. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click Save, the system displays an error. Correct all errors and click Save again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Community Action Plan Summary page. |

### Community Project Period Objective

| Field/Section/Button | Instructions |
|---|---|
| **Priority Area*** | Select the appropriate priority area(s) from the list. The priority areas displayed are determined by the FOA. |
| **Describe the objective and how it will impact the problem*** | Enter a description for the objective and describe the impact that the objective will have on the problem that is addressed by the project period objective.<br><br>Maximum text is 2000 characters, about 400 words. |
| **Direction of Change*** | Select the direction of change that will be measured and indicate if you plan to increase, decrease, or maintain the goal. |
| **Unit of Measurement*** | Select the unit of measurement that will be used to measure the project period objective. |
| **What will be measured*** | Entered what will be measured in the project period objective.<br><br>Maximum text is 2000 characters, about 400 words. |
| **Baseline*** | Enter the baseline figure for what will be measured in the text box. |

| | |
|---|---|
| | Maximum text is 10 numeric digits.<br><br>If you do not know the baseline, select the Unknown check box. If you select Unknown, the Baseline field is not required. |
| **Target*** | Enter the target figure for what will be measured in the text box.<br><br>Maximum text is 10 numeric digits. |
| **Primary Data Source*** | Enter the primary data source that will be used for the project period objective.<br><br>Maximum text is 200 characters, about 40 words. |
| **Secondary Data Source*** | Enter the secondary data source that will be used for the project period objective.<br><br>Maximum text is 200 characters, about 40 words. |
| **Timeframe** | Enter the beginning and end dates for the community PPO. The format for the data range is MM/DD/YYYY - MM/DD/YYYY. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Community Action Plan Summary page. |

## Project Period Objective Progress

| Field/Section/Button | Instructions |
|---|---|
| **Related Project Period Objective Details** | Displays the related project period objective details in SMART format. |
| **Progress Period*** | Select the period for the project period objective progress, First six months or Second six months, from the drop-down list. |

| | |
|---|---|
| **Objective's Target Met*** | Indicate if the project period objective's target has been met, or not met, or still ongoing. |
| **Describe Progress*** | Enter a description for the project period objective progress.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Barriers/Issues Encountered and Plans to Overcome*** | Describe the barriers or issues encountered in the process of achieving success. Also, describe the plans or strategy that you will use to overcome the barriers or issues encountered.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the View Project Period Objective Progress page. |

### Annual Objective

| Field/Section/Button | Instructions |
|---|---|
| **Setting*** | Select the setting for the annual objective from the list. |
| **Related PSE Strategies*** | Select the related PSE strategies for this annual objective from the list.<br><br>If the desired setting is not in included in the list, specify it in the *Other* text box. Maximum text for the Other field is 50 characters, about 10 words. |
| **Describe the evidence/practice base for the strategy*** | Describe in details the evidence or practice on which the strategy for the annual objective is based.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Number of people reached*** | Enter the number of people that will be reached. |

| | |
|---|---|
| | Maximum text is 6 numeric digits. |
| **Describe the objective and how it will impact the problem*** | Describe the annual objective in details and specify how the annual objective will impact the problem being addressed.<br>Maximum text 3000 characters, about 600 words. |
| **Direction of Change*** | Select the direction of change that will be measured and indicate if you plan to increase, decrease, or maintain the objective. |
| **Unit of Measurement*** | Select the unit of measurement that will be used to measure the annual objective. |
| **What will be measured?*** | Enter what will be measured in the AO in the text box.<br>Maximum text 200 characters, about 40 words. |
| **Baseline*** | Enter the baseline figure for what will be measured in the text box.<br>Maximum text is 10 numeric digits.<br>If you do not know the baseline, select the Unknown check box. If you select Unknown, the Baseline field is not required. |
| **Target*** | Enter the target figure for what will be measured in the text box.<br>Maximum text is 10 numeric digits. |
| **Primary Data Source*** | Enter the primary data source that will be used for the annual objective.<br>Maximum text is 200 characters, about 40 words. |
| **Secondary Data Source*** | Enter the secondary data source that will be used for the annual objective.<br>Maximum text is 200 characters, about 40 words. |
| **Timeframe** | Displays the one-year time frame for the annual objective. |

| | |
|---|---|
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the Annual Objective page. |

### Annual Objective Progress

| Field/Section/Button | Instructions |
|---|---|
| **Related Project Period Objective** | Displays the annual objective associated with this progress information. |
| **Progress Period*** | Select the period for the annual objective progress, First six months or Second six months, from the drop-down list. |
| **Objective's Target Met*** | Indicate if the annual objective's target has been met, or not met, or still ongoing. |
| **Describe Progress*** | Enter a description for the AO progress.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Barriers/Issues Encountered*** | Describe the barriers or issues encountered in the process of achieving success. Also, describe the plans or strategy that you will use to overcome the barriers or issues encountered.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Plans to Overcome Barriers/Issues Encountered*** | Describe the plans or strategy that you will use to overcome the barriers or issues encountered.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click Save, the |

| | |
|---|---|
| | system displays an error. Correct all errors and click Save again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the View Annual Objective Progress page. |

### Activities

| Field/Section/Button | Instructions |
|---|---|
| **Activity Title*** | Enter a title for the activity. For example, Develop Training Program.<br>Maximum is 200 alphanumeric characters, about 40 words. |
| **Activity Description*** | Enter a concise description for the activity.<br>Maximum is 3000 characters, about 600 words. |
| **Timeframe*** | Select the timeframe of initiation for the activity from the drop-down list. |
| **Save** | Click *Save* to save the information you entered. The system saves the information and returns you to the Community Action Plan Summary page.<br>If any fields on the page are incomplete or invalid, the system displays an error. Correct all invalid fields and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and display the Annual Activities Summary page. |

### Add/Edit/View Product

The pages for entering initial information and modifying existing product information are identical. The only difference is that the *Edit* page displays the existing information for the product while the fields in the page for adding initial information are blank. Use the *Add* page to enter initial information and the Edit page to modify existing information. Use the View page to view objective product information.

| Field/Section/Button | Instructions |
|---|---|

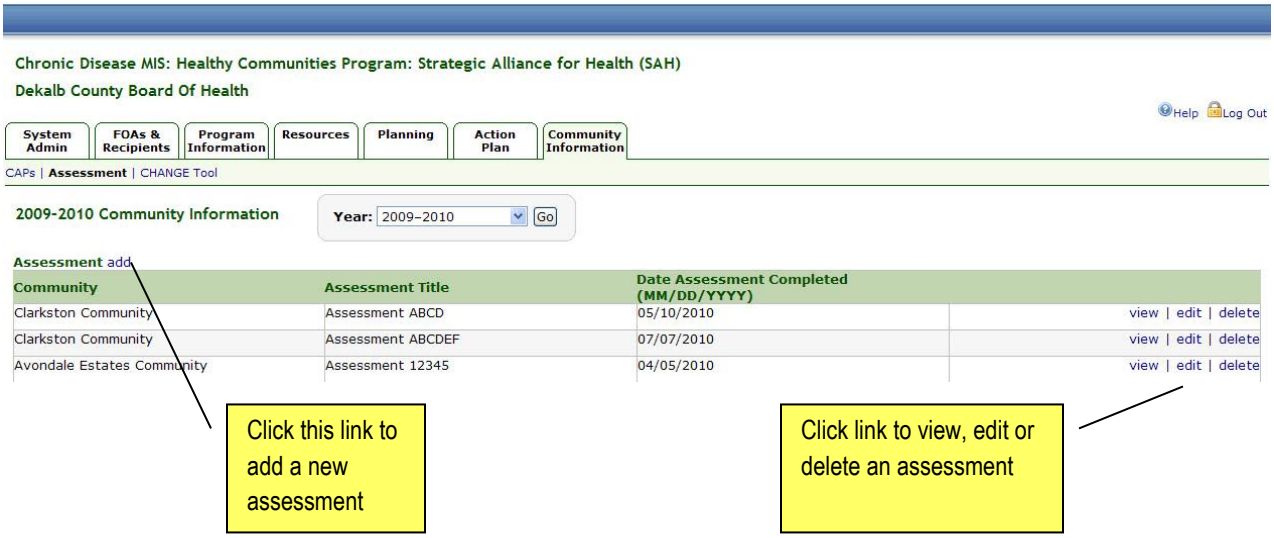
| | |
|---|---|
| **Related Annual Objective** | The system displays the name, status, and time frame of the related objective to which this activity is being added. This information is view only and cannot be modified. |
| **Product Title*** | Enter a descriptive title for the product.<br><br>Maximum is 200 characters, about 40 words. |
| **Product Description*** | Enter a description for the product.<br><br>Maximum is 1500 characters, about 300 words. |
| **Product Type** | Select a product type from the drop-down list.<br><br>If the product type is not in included in the list, select *Other (specify)*, and enter it in the Other text box. Maximum text for the Other field is 100 characters, about 20 words. |
| **Product Attachment** | Enter the complete path for the document that you want to attach or click *Browse* to navigate to the location where the document is saved, and select the document.<br><br>To edit an attached file, you should edit the copy of the file on your computer, then you must delete the attached file and then upload it again.<br><br>Maximum text is 200 alphanumeric characters. |
| **Save** | Click *Save* to save the information you entered. The system saves the information and returns you to the Project Period Objective Summary page.<br><br>If any fields on the page are incomplete or invalid, the system displays an error. Correct all invalid fields and click *Save* again. |
| **Cancel** | Click *Cancel* to discard any information entered and display the Project Period Objective Summary page. |

*= Required field

# Assessments

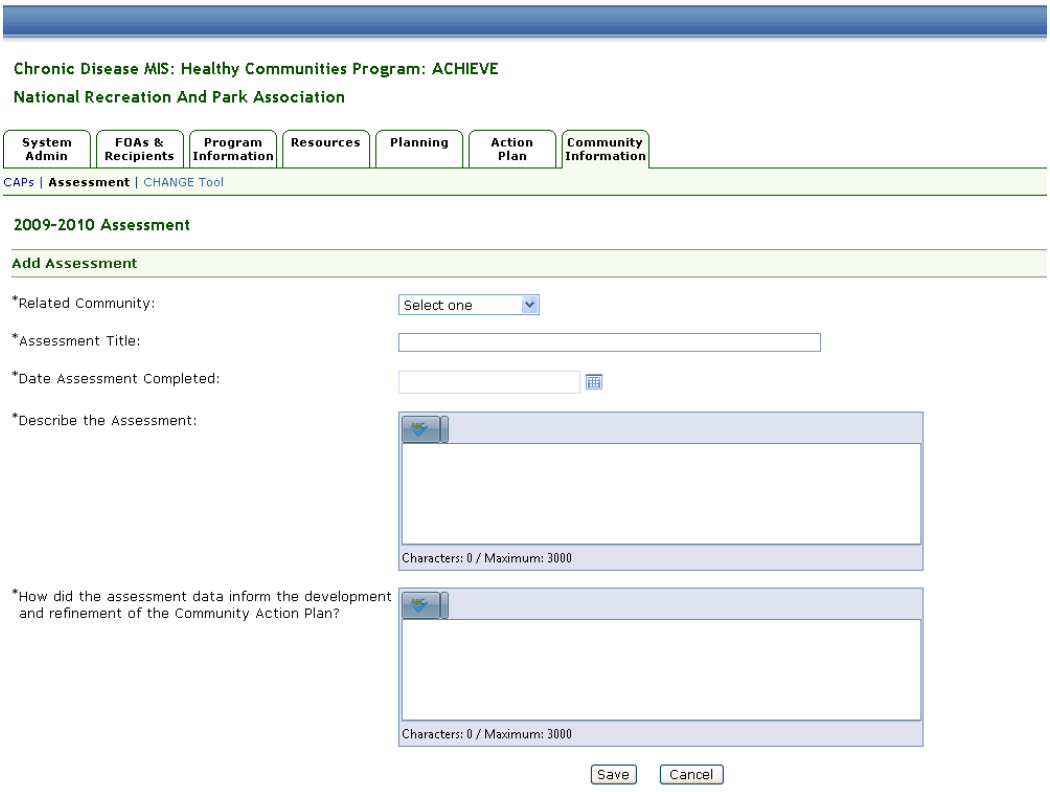
## Assessments List Page

The list page contains a summary of the assessments associated with a community



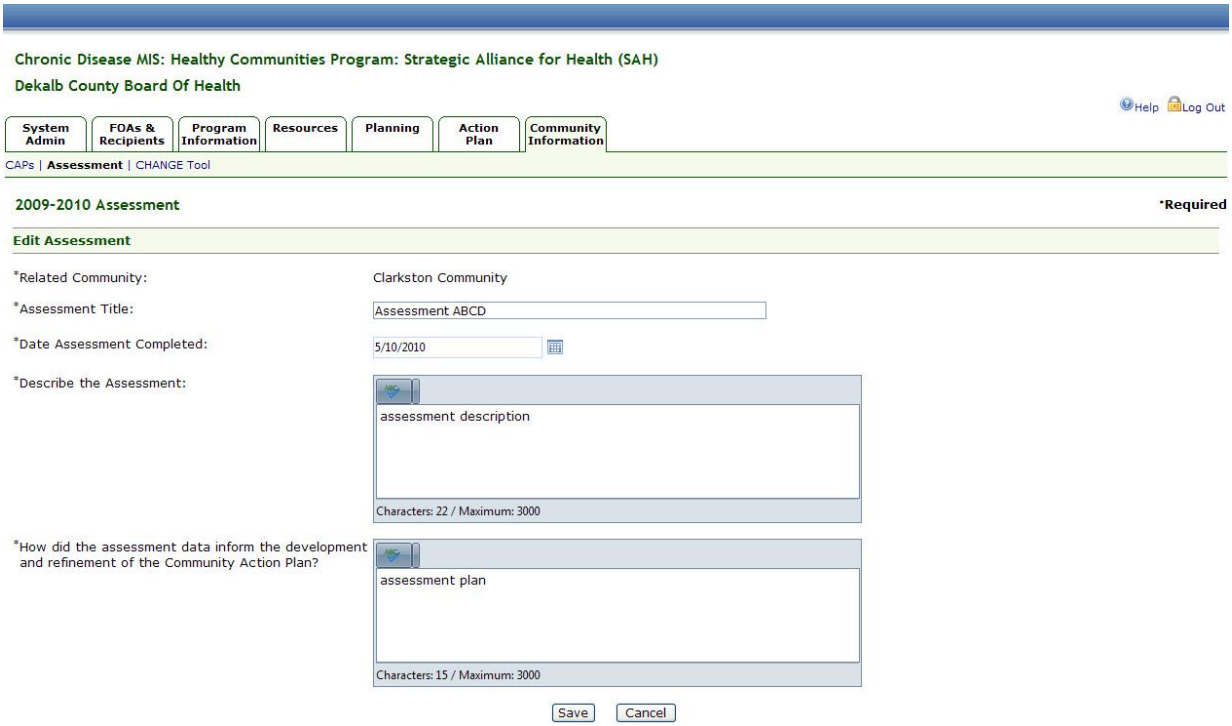

## Add Assessment

- Select the 'Assessment Add' Link from the Assessment list
- Complete the required fields on the 'Assessments Add' page to add a new assessment



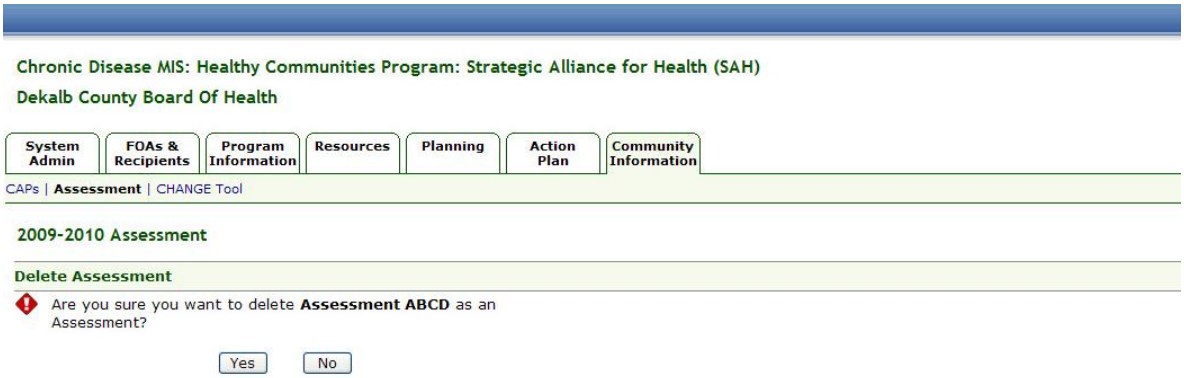
## Edit Assessment Page

- Click in the field to be edited and enter new information or select new list value.




## Delete Assessment

- Select the delete link from the Assessment List page
- Click 'Yes' to confirm delete or 'No' to cancel



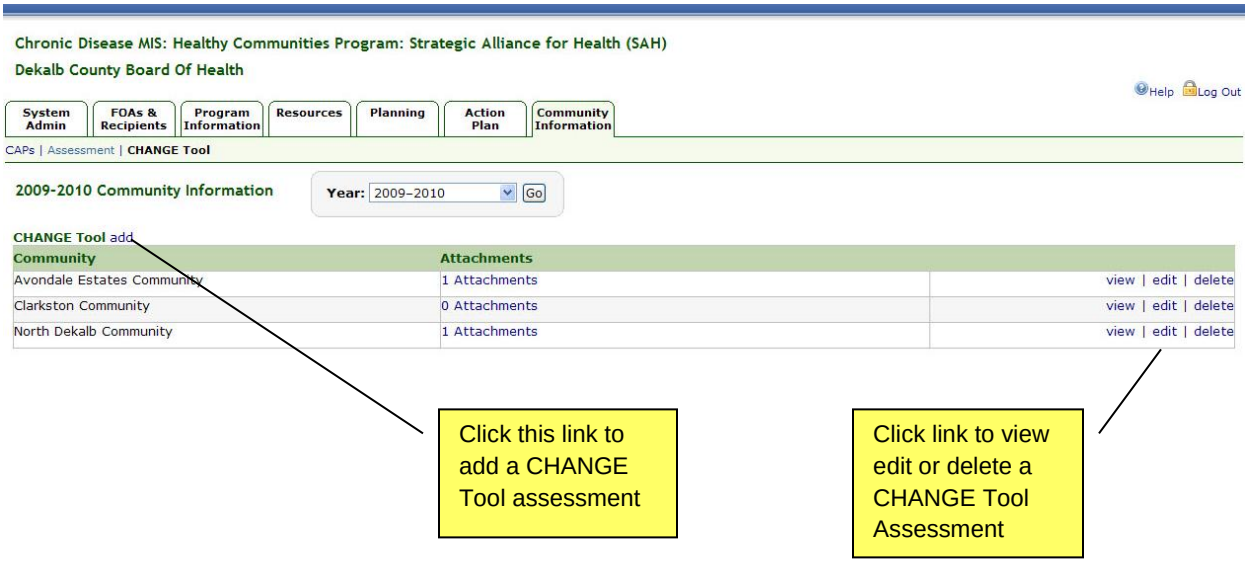
## Assessment Field Instructions

| Field/Section/Button | Instructions |
|---|---|
| **Related Community*** | Select the community associated with this assessment from the drop-down list of communities.. |
| **Assessment Title*** | Enter the title of the Assessment.<br>Maximum text is 200 characters, about 40 words. |
| **Date Assessment Completed*** | Enter the date the Assessment was completed.<br>Enter the two-digit month in the first text box, for example 01.<br>Enter the four-digit year in the second text box, for example 2009. |
| **Describe the Assessment*** | Enter a detailed description of the assessment.<br>Maximum text is 3000 characters, about 600 words. |
| **How did the assessment data inform the development and refinement of the Community Action Plan?*** | Describe in detail the assessment data was used in defining and refining the community action plan.<br>Maximum text is 3000 characters, about 600 words. |
| **Save** | Click *Save* to save the assessment information and return to the Assessment list page.<br>If any fields on the page are incomplete or invalid when you click *Save*, the system displays an error. Correct all errors and click *Save* again. |
| **Cancel** | Click Cancel to discard any information entered and return to the Assessment list page. |
| **Back** | Click *Back* to return to the Assessment list page. This button is available only on the View page. |

# CHANGE Tool

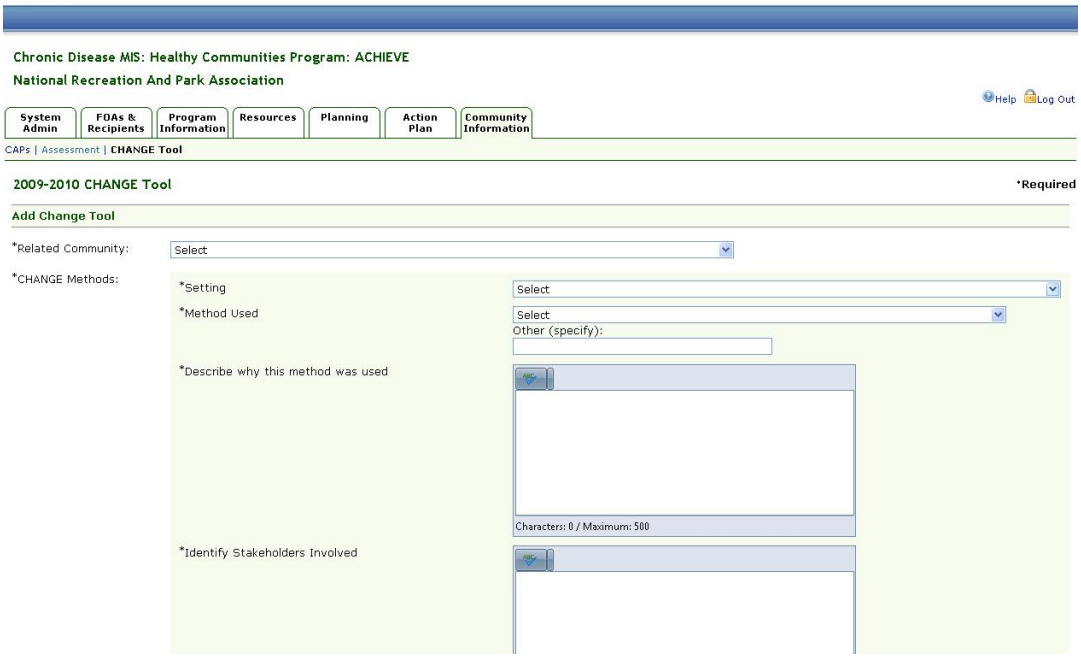
Use the CHANGE (Community Health Assessment and Group Evaluation) Tool section to document and track CHANGE information in the community.

## CHANGE Tool List Page



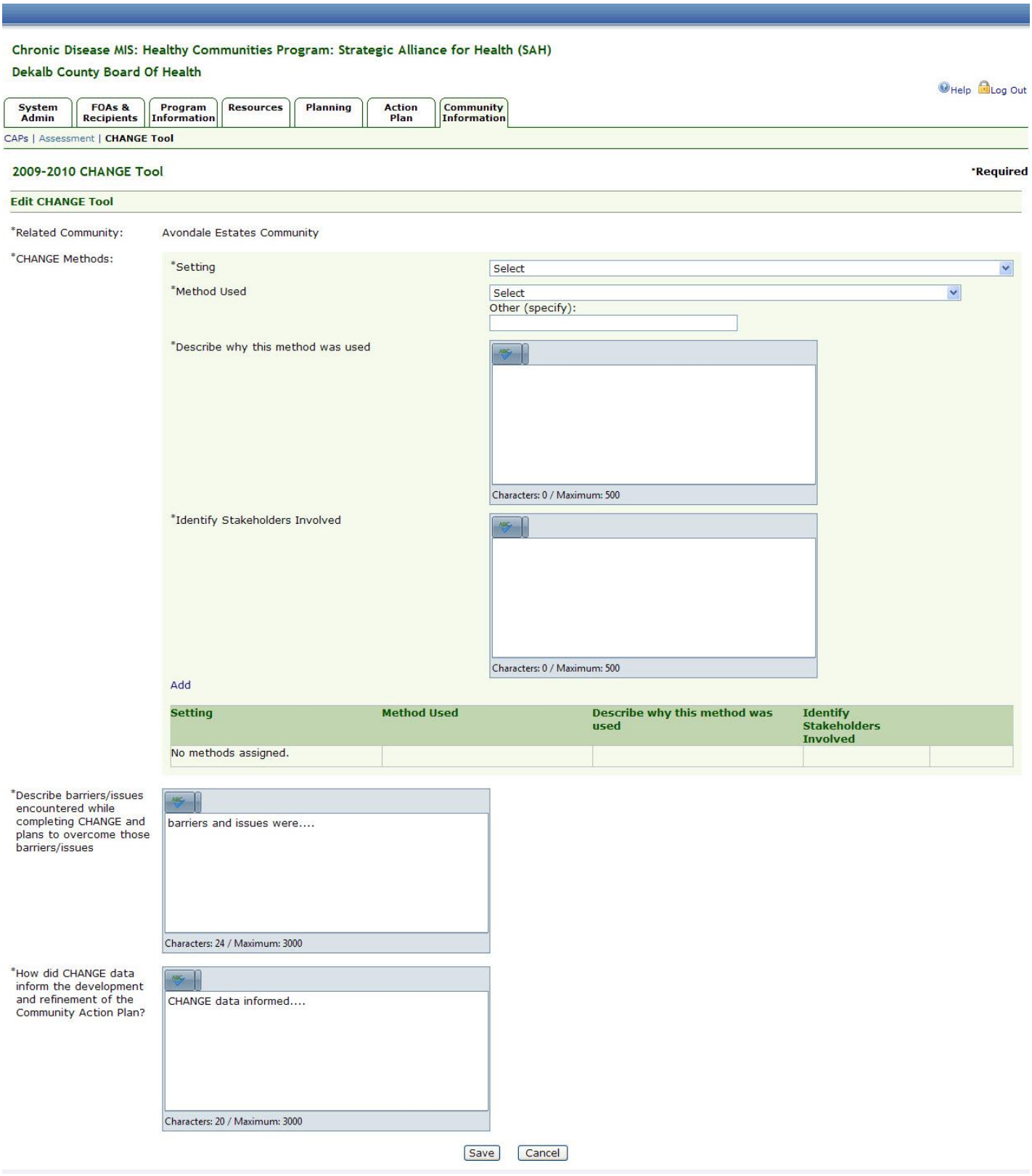

## Add Change Tool

- Select the 'CHANGE Tool Add' Link from the CHANGE Tool list page.
- Complete the required fields on the 'CHANGE Tool Add' page to add a CHANGE Tool assessment.



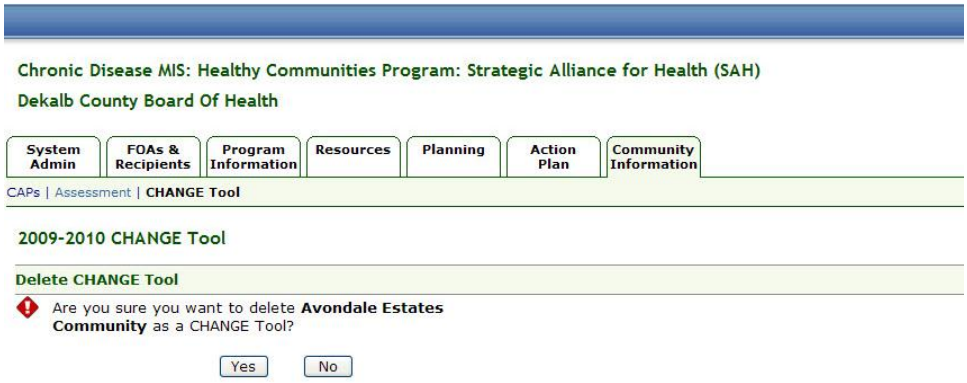
## Edit CHANGE Tool

- Click in the field to be edited and enter new information or select new list value.



## Delete CHANGE Tool

- Select the delete link from the CHANGE Tool list page to display the delete confirmation message
- Click 'Yes' button to confirm delete or 'No' to cancel



## CHANGE Tool Field Instructions

| Field/Section/Button | Instructions |
|---|---|
| **Related Community*** | Select the community associated with this CHANGE from the drop-down list of communities. |
| **Setting*** | Select a setting for the CHANGE from the drop-down list. |
| **Method Used*** | Select the method used for the CHANGE from the drop-down list.<br><br>If the type of method is not in included in the list, enter the information in the Other text box. Maximum text for the Other field is 100 characters, about 20 words. |
| **Describe why this method was used*** | Describe why the selected method was used for the CHANGE.<br><br>Maximum text is 500 characters, about 100 words. |
| **Identify the stakeholders involved*** | Identify all the stakeholders that were involved in the CHANGE.<br><br>Maximum text is 500 characters, about 100 words. |
| **Add** | Click the *Add* link to save the added CHANGE method. The saved information is displayed in a table below the *Add* button.<br><br>If any fields are incomplete or invalid, when you click *Add*, the system displays an error. Correct all errors and click *Add* again. |
| **Edit** | Click the *Edit* link to edit existing CHANGE method. |
| **Delete** | Click the *Delete* link to delete existing CHANGE method. |
| **Describe barriers/issues encountered while completing CHANGE and plans to overcome those barriers/issues*** | Describe the barriers or issues encountered while completing the CHANGE. Also, describe the plans for overcoming the barriers or issues.<br><br>Maximum text is 3000 characters, about 600 words. |

| | |
|---|---|
| **How did CHANGE data inform the development and refinement of the Community Action Plan?*** | Describe in detail how the CHANGE data was used to develop and refine the community action plan.<br><br>Maximum text is 3000 characters, about 600 words. |
| **Save** | Click *Save* to save the information entered.<br><br>If any fields on the page are incomplete or invalid, when you click *Save*, the system displays an error. Correct all errors and click Save again. |
| **Cancel** | Click *Cancel* to discard any information entered and return to the CHANGE Tool summary page. |
| **Back** | Click *Back* to return to the CHANGE Tool summary page. This button is available only on the View page. |

# Reports Tab

## Introduction:

The Reports section allows you to generate the Interim and Annual Progress reports required by the CDC each budget period. Your Project Officer/Program Consultant will provide you with the exact date for submission of the reports.

- **Interim Progress Report** - includes Action Plan progress for the first six months of the budget year, and the Action Plan for the upcoming budget year.

- **Annual Report -** includes progress for the entire budget year.

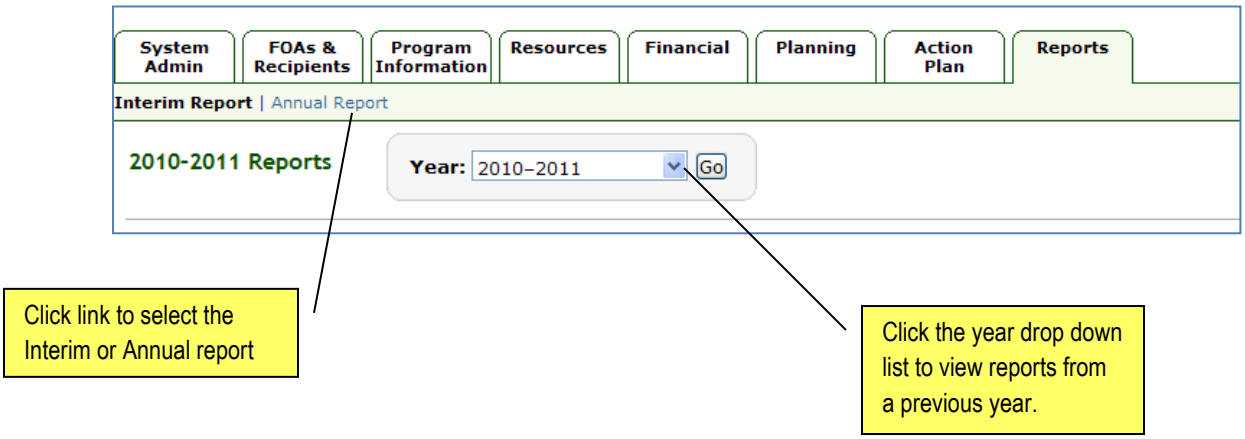
Information from various sections of the MIS is used to generate the reports. The MIS guides you through a series of steps required for creating the report. At the end of this process, you will have the option to create a draft version of the report for review. Any updates necessary once the draft report is generated should be made in the MIS and a new draft copy of the report should be run. Once you are satisfied with the information contained in the report, you will have the option to finalize and print the report for submission to the CDC.

**Accessing Reports in the MIS:**

- To access either report, click the Reports tab.

- The system will default to the correct report (Interim or Annual) based on the current date. If you need to access the other report, click on its link.

- To view reports from a previous year, select the year from the drop-down list and click the 'Go' button.



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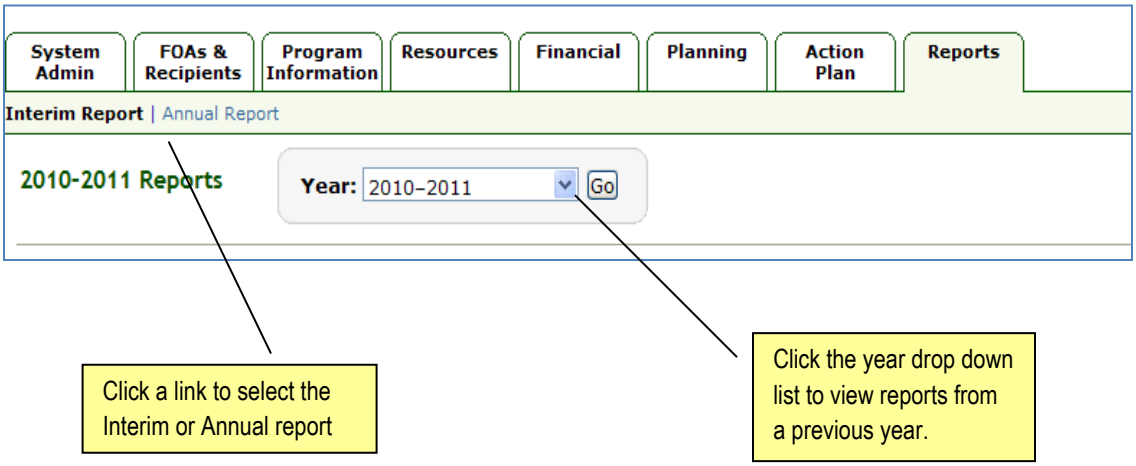


## Interim Report Instructions:

The Interim Report contains the Action Plan for the current year, progress for each Annual Objective, and the Action Plan for the upcoming budget year.

To create the Interim Report:

- Navigate to the Reports tab. Depending on the reporting period, the Interim Report page will be displayed. If not, click on the Interim Report link.

  - The MIS will guide you through the five steps required to generate the Interim Report:
    - Step 1: Review Errors in Current Action Plan
    - Step 2: Enter Report Narrative
    - Step 3: Transfer Information
    - Step 4: Review Errors in the New Action Plan
    - Step 5: Update Report Status

  - Each step must be completed in the order shown. Subsequent steps are not accessible until the current step is complete.

  - Initially, the status of each step is set to 'Incomplete'. As you finish a step, the status is automatically changed to 'Complete.'

- To execute a step, click on its link.

**Interim Report - DRAFT**

| Process | Status |
|---|---|
| Step 1: Review Errors in Current Action Plan | Incomplete |
| Step 2: Enter Report Narrative | Incomplete |
| Step 3: Transfer Information | Incomplete |
| Step 4: Review Errors in New Action Plan | Incomplete |
| Step 5: Update Report Status | DRAFT |

Click on the link to execute the step.

Step Status

## Step 1: Review Errors in Current Action Plan

- In Step 1, the MIS reviews the current Action Plan to check that information required for generating the Interim Report has been entered. The following information is required for the Interim Report:

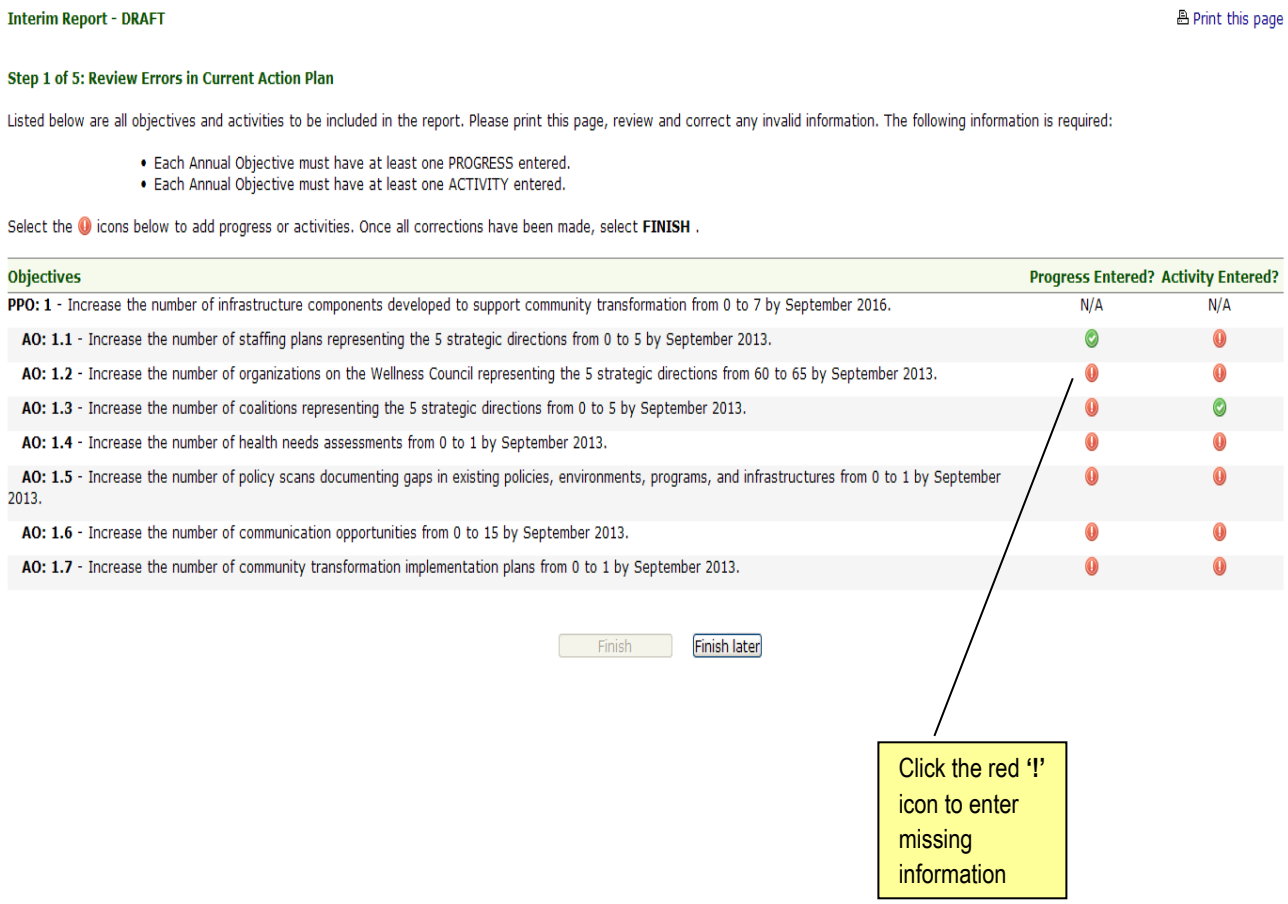
  - Each Annual Objective must have progress entered for first 6-months
  - At least one Activity must be entered for each Annual Objective

- The results of the system's Action Plan review are displayed:

  - Indicates information has been entered

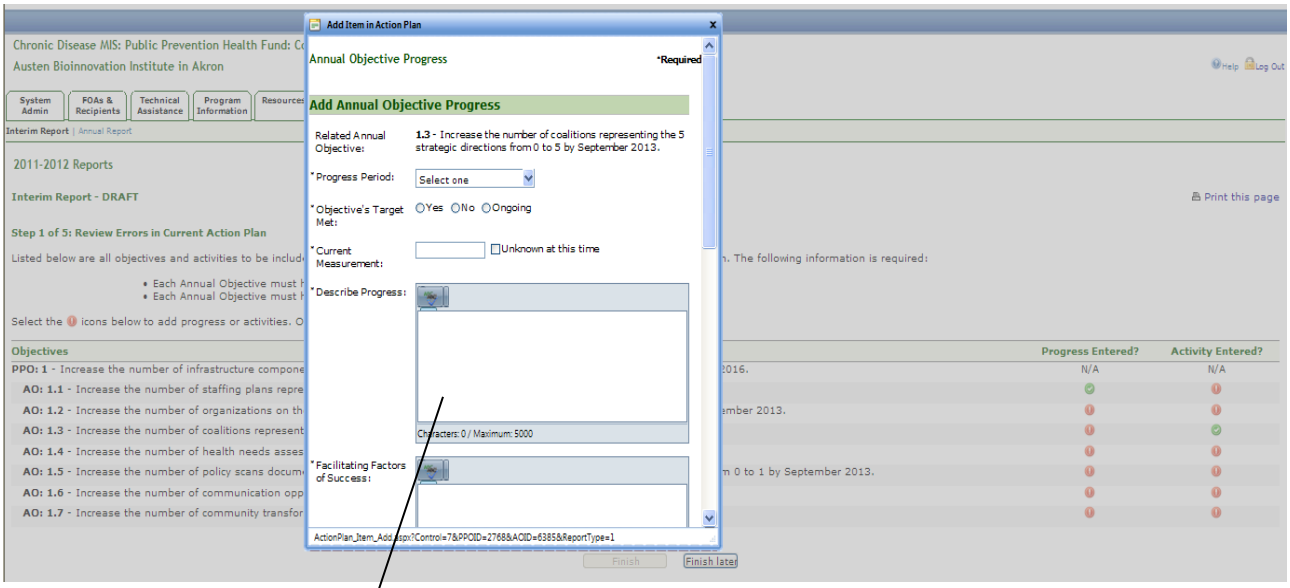
  - Indicates information has not been entered

  N/A - Indicates information is not required



To enter missing activities or progress:

- Click on the red '!' icon. The page required to enter the missing activity or progress will be displayed in a 'pop-up' window over the 'Step 1: Review Errors in Current Action' Plan page.



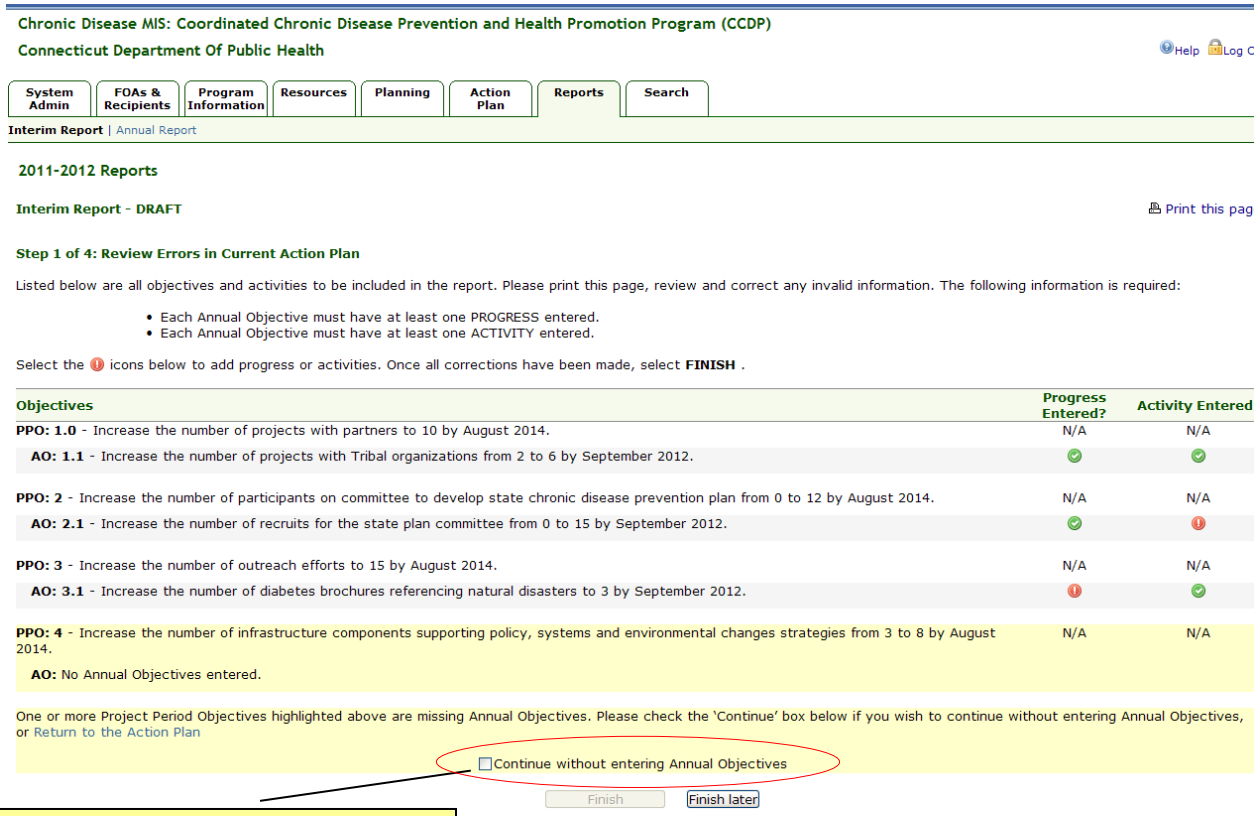

- Enter the required information and click 'Save.' The activity or progress entered will be saved in the current year's Action Plan.

- On the Review page, the red **'!'** icon will be replaced with the green **'✓'** icon.

- Missing Objectives Warning:
  - Some programs require at least one Annual Objective for each Project Period Objective (PPO) entered in the Action Plan. The MIS checks for this condition and issues a warning message if it finds PPOs without Annual Objectives. Each PPO missing an Annual Objective is highlighted, and a message with a check box to 'Continue without annual objectives' is displayed at the end of the page.

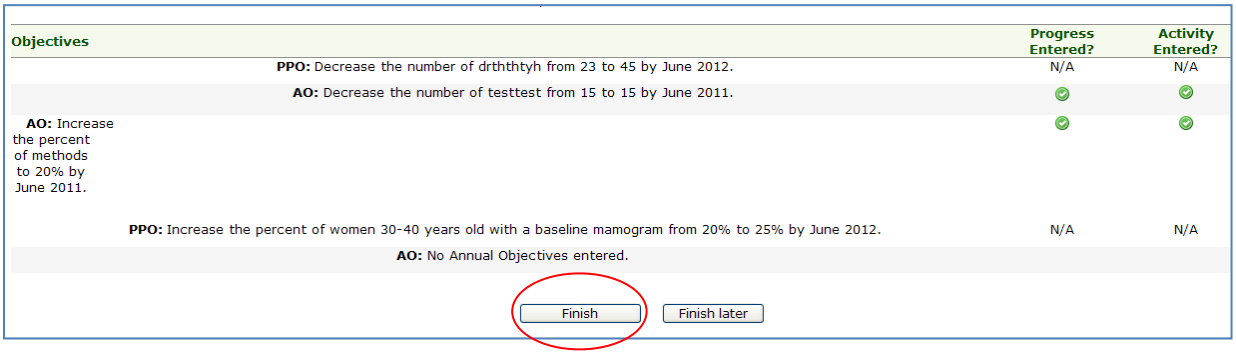
  - If your program requires at least one Annual Objective for each PPO, **do not** check the 'Continue without Annual Objectives' check box. Instead, click the 'Return to the Action Plan' link to go back to the Action Plan and enter an Annual Objective for the highlighted Project Period Objective. (Please refer to you program guidance to determine if this applies to you. If your Program guidance allows a PPO to be entered without an Annual Objective, click the checkbox to continue. The 'Finish' button will then be enabled, allowing you to complete Step 1.)

## Missing Objectives Warning:




Click this checkbox if you don't need to add Annual Objectives for the highlighted Project Period Objective

- When all errors have been corrected, and all icons are green, the finish button will be enabled. If the PPO without Annual Objectives warning is displayed, the 'Finish' button will not be enabled until the 'Continue without Annual Objectives' box is checked, or at least one Annual Objective is entered for the PPO.




- Click the Finish button to complete Step 1. This will also enable Step 2.

- If you were not able to add all the required activities or progress, you can click the 'Finish Later' button to save your changes and return to Step 1 later.

## Step 2: Enter Narrative Report

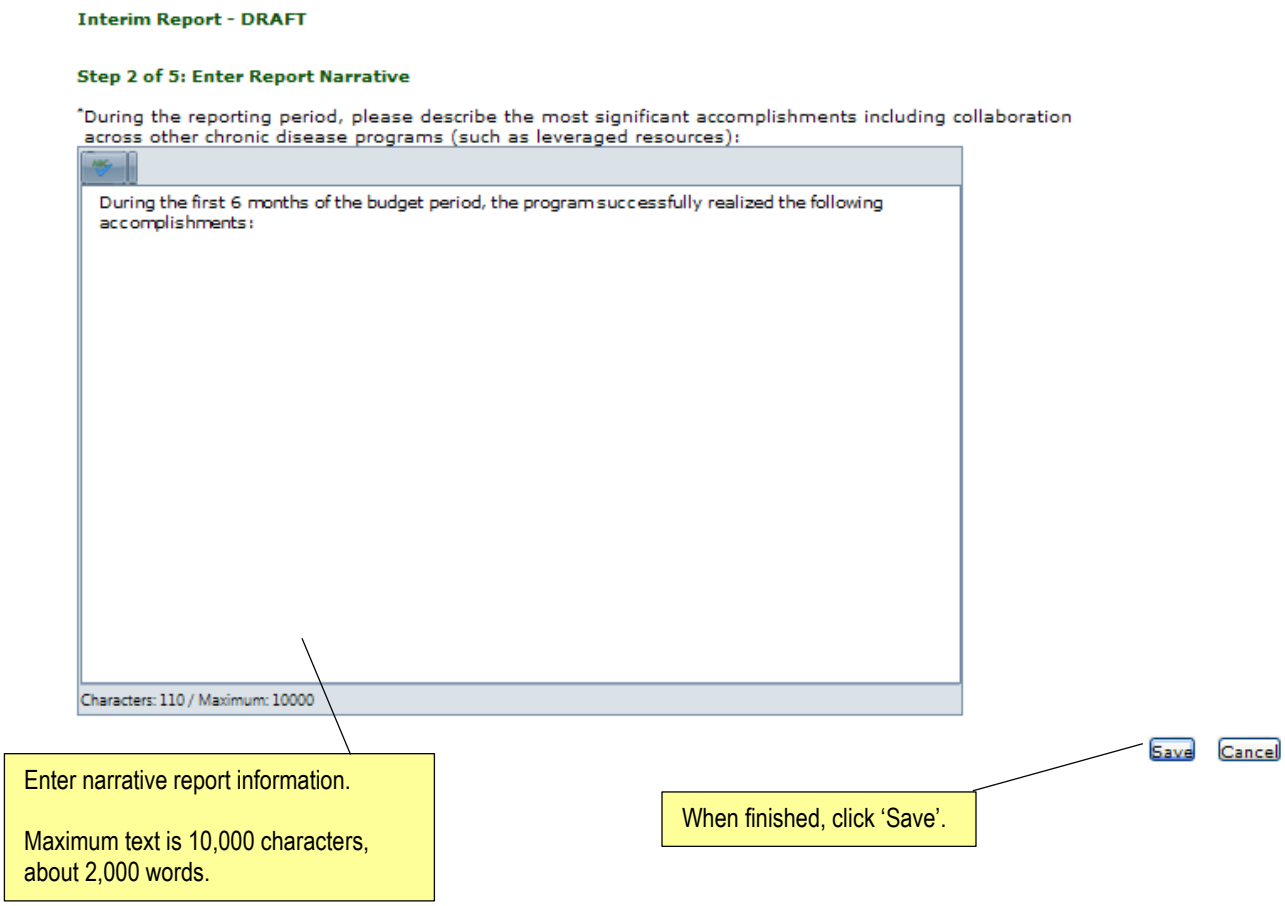
In Step 2, complete the field 'During the reporting period, please describe the most significant accomplishments including collaboration across other chronic disease programs (such as leveraged resources)' by describing in detail the most significant accomplishments by your program, how they were achieved, other chronic programs with whom you collaborated, etc.

Maximum text is 10,000 characters or about 2,000 words. You may enter information directly in the text box, or cut and paste information from another application such as Microsoft Word.

To complete Step 2 of the Interim Report process:

1. Click on the 'Step 2: Enter Report Narrative' link. The system displays the Step 2 of 5: 'Enter Report Narrative' page.
2. Enter the information about your program's most significant accomplishments for the first 6 months of the reporting year, including collaboration across other chronic disease programs.
3. When finished entering information, click 'Save'. The system saves the narrative report, marks Step 2 as Complete, and enables the link for 'Step 3: Transfer Information'. (Note: the 'Save' button is disabled when the narrative field is blank and becomes enabled when text is entered.)

   *Note*: You can update the narrative report in Step 2 as often as necessary up until the Interim Report is finalized in Step 5.



## Step 3: Transfer Information

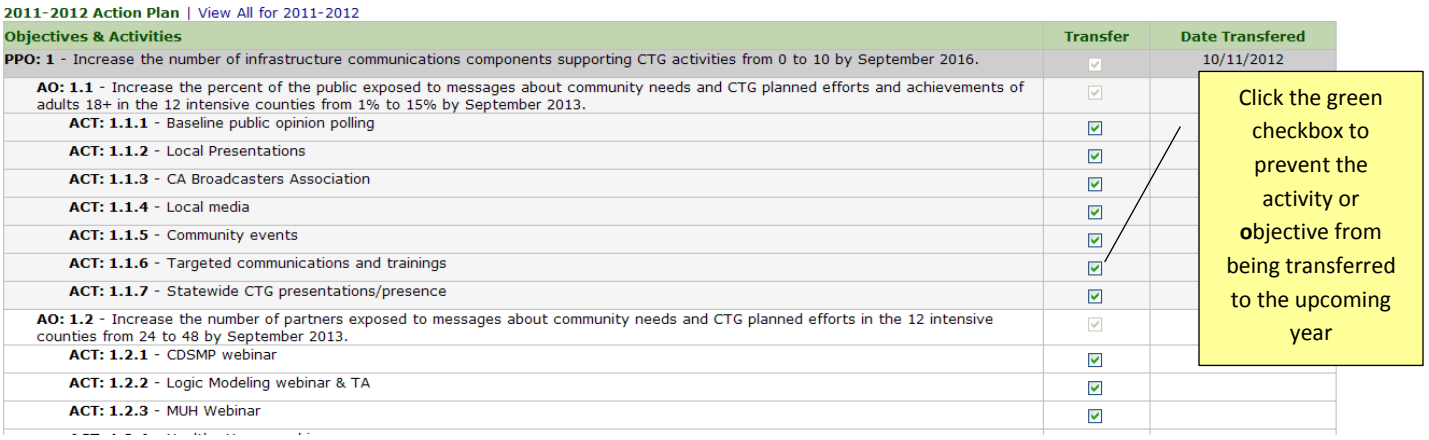
Step 3 transfers information from one budget year to the next. Information in the following tabs will be transferred to the upcoming year:

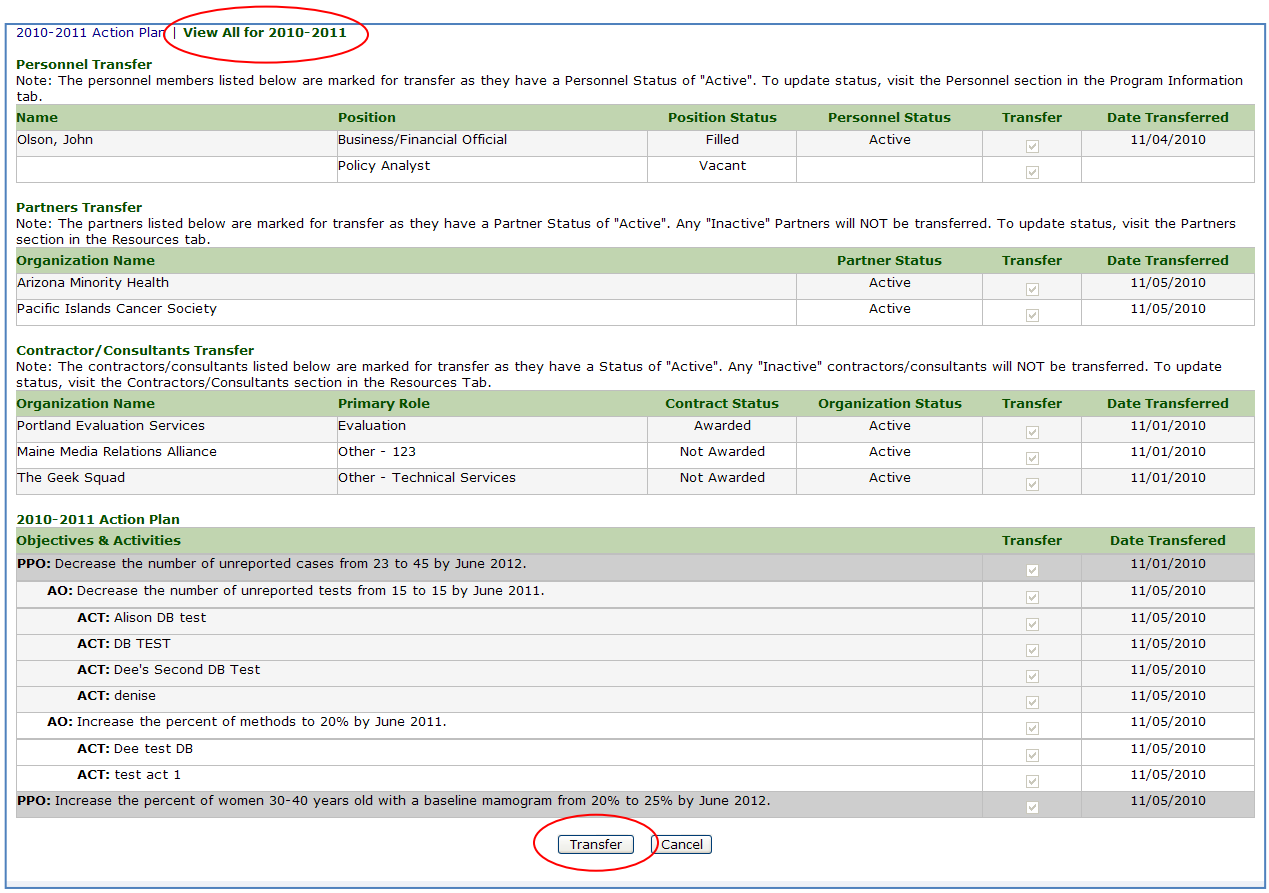
- **Program Information tab** - All Contact Information and Program Summary information.
- **Resources tab -** All active Personnel, Partners, and Contractors/Consultations; all 'Vacant' positions; the Partnership/Coalition (CCC), and the Leadership team (HCP: SAH).
- **Financial tab (CCC Only) -** All information.
- **Planning Tab:** All information (Standard and Other Data Sources, Plans and Logic Models).
- **Action Plan -** All information *except PPO and AO progress*. Products will be transferred if the related Activity is transferred.
- **Community Information (HCP: Achieve/SAH/PHC)** - as applicable.
- All existing **attachments** in any section.

- Project Period Objective (PPO) **Progress** and Annual Objective **Progress** cannot be transferred to the upcoming year. Progress must be entered on an annual basis, at least once for each PPO (during Annual Report), and twice for each Annual Objective (once per Interim and once per Annual).

**To transfer information to the upcoming year:**

- Click the link to execute 'Step 3: Transfer Information'
- The Action Plan items selected for transfer will be displayed. Click the 'View All for YYYY-YYYY' link to see an expanded list of information that will be transferred from the Personnel, Partners, Contract/Consultant and Action Plan sections.
- You may uncheck Action Plan items selected for transfer if you do not want them transferred to the upcoming year. However, you must uncheck all associated Activities before you can uncheck an Annual Objective, and if you check an Annual Objective Activity, the Annual Objective will also become checked.





2010-2011 Action Plan | **View All for 2010-2011**

**Personnel Transfer**

Note: The personnel members listed below are marked for transfer as they have a Personnel Status of "Active". To update status, visit the Personnel section in the Program Information tab.

| Name | Position | Position Status | Personnel Status | Transfer | Date Transferred |
|---|---|---|---|---|---|
| Olson, John | Business/Financial Official | Filled | Active | ☑ | 11/04/2010 |
| | Policy Analyst | Vacant | | ☑ | |

**Partners Transfer**

Note: The partners listed below are marked for transfer as they have a Partner Status of "Active". Any "Inactive" Partners will NOT be transferred. To update status, visit the Partners section in the Resources tab.

| Organization Name | Partner Status | Transfer | Date Transferred |
|---|---|---|---|
| Arizona Minority Health | Active | ☑ | 11/05/2010 |
| Pacific Islands Cancer Society | Active | ☑ | 11/05/2010 |

**Contractor/Consultants Transfer**

Note: The contractors/consultants listed below are marked for transfer as they have a Status of "Active". Any "Inactive" contractors/consultants will NOT be transferred. To update status, visit the Contractors/Consultants section in the Resources Tab.

| Organization Name | Primary Role | Contract Status | Organization Status | Transfer | Date Transferred |
|---|---|---|---|---|---|
| Portland Evaluation Services | Evaluation | Awarded | Active | ☑ | 11/01/2010 |
| Maine Media Relations Alliance | Other - 123 | Not Awarded | Active | ☑ | 11/01/2010 |
| The Geek Squad | Other - Technical Services | Not Awarded | Active | ☑ | 11/01/2010 |

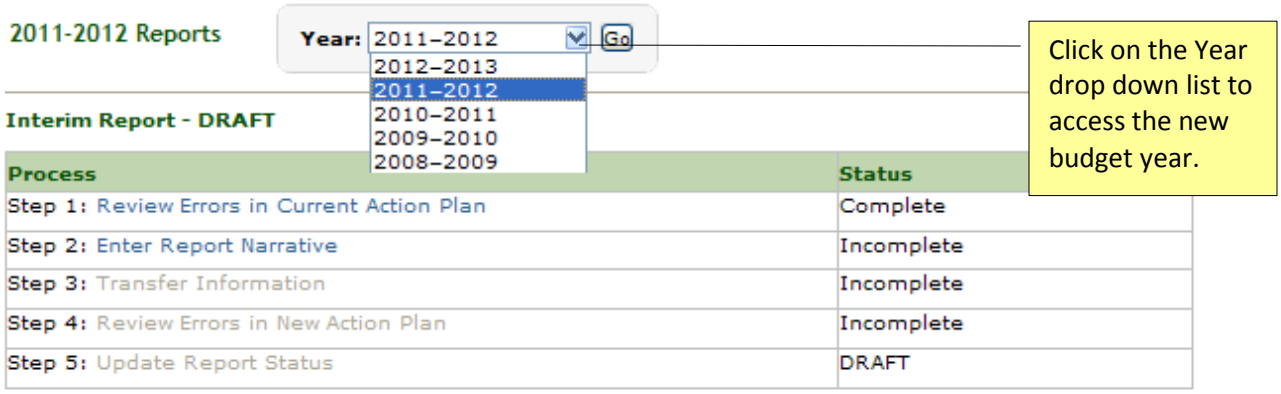
**2010-2011 Action Plan**

| Objectives & Activities | Transfer | Date Transfered |
|---|---|---|
| **PPO:** Decrease the number of unreported cases from 23 to 45 by June 2012. | ☑ | 11/01/2010 |
| **AO:** Decrease the number of unreported tests from 15 to 15 by June 2011. | ☑ | 11/05/2010 |
| **ACT:** Alison DB test | ☑ | 11/05/2010 |
| **ACT:** DB TEST | ☑ | 11/05/2010 |
| **ACT:** Dee's Second DB Test | ☑ | 11/05/2010 |
| **ACT:** denise | ☑ | 11/05/2010 |
| **AO:** Increase the percent of methods to 20% by June 2011. | ☑ | 11/05/2010 |
| **ACT:** Dee test DB | ☑ | 11/05/2010 |
| **ACT:** test act 1 | ☑ | 11/05/2010 |
| **PPO:** Increase the percent of women 30-40 years old with a baseline mamogram from 20% to 25% by June 2012. | ☑ | 11/05/2010 |

Transfer Cancel

- Click the **Transfer** button to have the selected items transferred to the upcoming budget year. The status of Step-3 will be changed to 'Complete' and Step-4 will be enabled.
- If you add new information to the current budget year Action Plan after executing the transfer step, the MIS will evaluate the changes made and reset the status of Step 1 to 'Incomplete' if necessary. If the status of Step 1 is changed to 'Incomplete', you will need to rerun Step before you can proceed to Step 4. (Note: the status of Step 2 will not be changed.)
- The 'Transfer' step may be run multiple times to transfer new information. Once an item has been transferred, it cannot be transferred again.
- If you edit an item in the current year after the transfer step, unless a change is made in the Action Plan, you will need to make the same edit in the upcoming year, if the change is needed in both years.
- If you are not ready to complete the transfer step, click the 'Cancel' button to return to the Interim Report main page.
- On completion of the transfer step, the new budget year will be created in the MIS.
- Both the current year and the upcoming year will remain open for data entry until the report is finalized in Step 5. Once the report is finalized, any updates will not appear in the report.

Please make sure that you have selected the correct year when entering data. If you inadvertently enter data in the upcoming year, you will need to delete it and re-enter it to the current year.




## Step 4: Review Errors in New Action Plan

- In Step 4, the MIS reviews the upcoming year's Action Plan to check that information required for generating the Interim Report has been entered. The only requirement for the upcoming year for the Interim Report is:
  - Every Annual Objective must have at least one Annual Activity associated with it.

- Click the step name link to execute Step 4. The MIS reviews the new Action Plan and displays a report of any errors found.

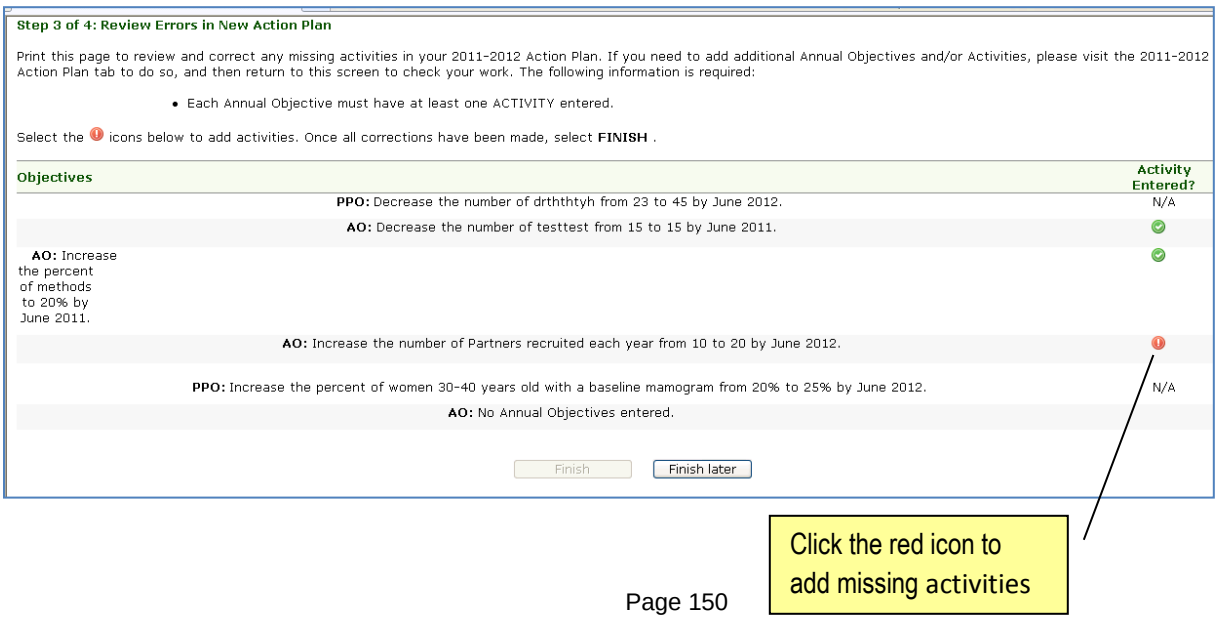
- The results of the system's Action Plan review for the upcoming year are displayed:

  - Indicates information has been entered

  - Indicates information has not been entered

  N/A - Indicates information is not required

- Click on the red '!' icon to display the 'Add Activity' page.



- As shown in Step 1, the 'Add Activity' page will be displayed in a pop-up window over the review page. Enter the required information and click the 'Save' button. The activity entered will be saved in the new year's Action Plan, and the red **'!'** icon on the review page will be replaced with a green **'✓'** icon.

- Click the Finish button to complete Step 4. This will also enable Step 5.

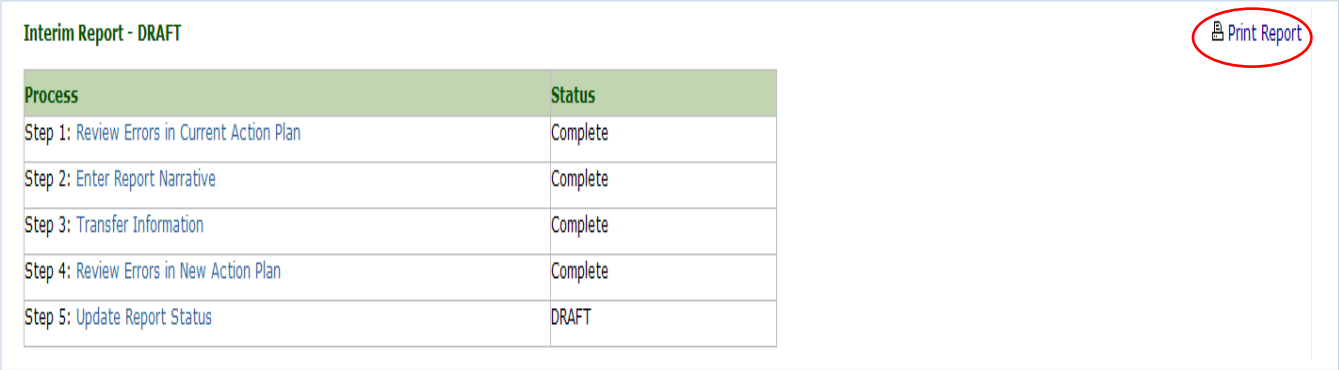
- If you were not able to add all the required activities or progress, you can click the 'Finish Later' button to save your changes and return to Step 4 later. However, you won't be able to proceed to Step 5 until Step 4 is finished.

## Step 5: Update Report Status

- In Step 5, you will finalize the Interim Report.

- *Note:* Once information is transferred, any changes to the information in the current year will not be reflected in the upcoming year.

- At any time before you finalize the Interim Report, you can view a draft of the report by clicking on the 'Print Report' link on the Interim Report main page.

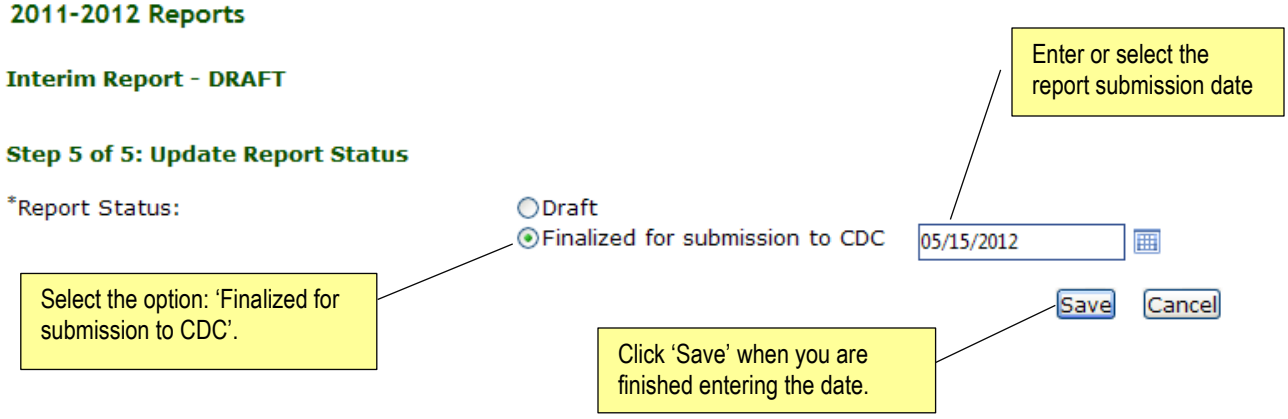



### Finalizing the Interim Report

To finalize the Interim Report, you must complete Step 5:

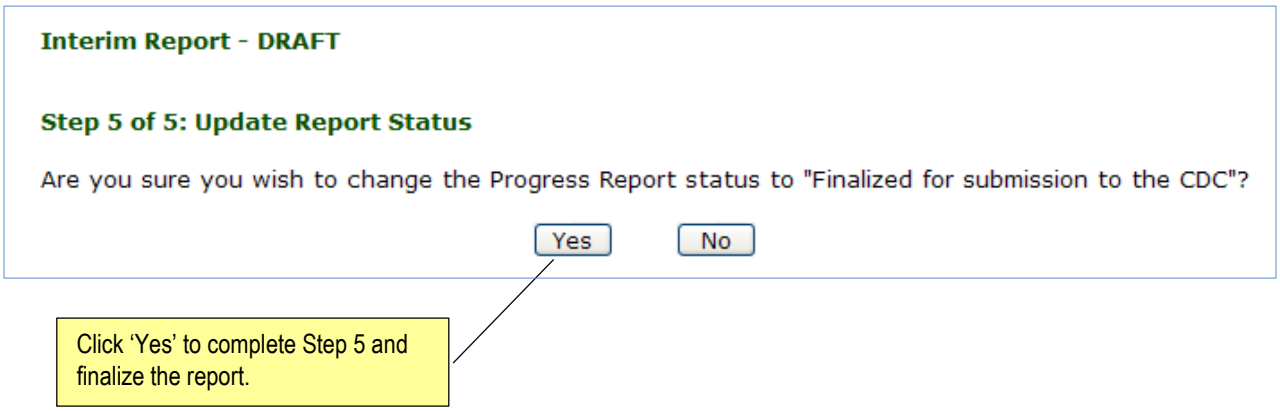
1. Click on the 'Step 5: Update Report Status' link.
2. In the Report Status field, select the 'Finalized for submission to CDC' option.
3. Enter the submission date into the text box (in the format MM/DD/YYYY). You can also click the calendar icon to select a date. This field is required.
4. Click the 'Save' button.

   *Note:* The 'Save' button only saves the selected 'Report Status', it does NOT finalize the report.


2011-2012 Reports
Interim Report - DRAFT
Step 5 of 5: Update Report Status
*Report Status:
Draft
Finalized for submission to CDC
05/15/2012
Save
Cancel
Enter or select the report submission date
Select the option: 'Finalized for submission to CDC'.
Click 'Save' when you are finished entering the date.

4. After you click the ‘Save’ button you will be prompted to confirm the change of the report status from ‘Draft’ to ‘Finalized’.

    - Click the ‘Yes’ button to complete the finalization process. The report status will be updated to ‘Finalized’ and the submission date will be entered. A link to view and print the finalized Interim Report will be displayed on the Interim Report main page.
    - Click ‘No’ to cancel the report finalization and return to the Update Report Status page where the report status will change back to ‘Draft’.




5. After you click ‘Yes’ on the confirmation message, the system saves the finalized status and the submission date. The system also does the following:

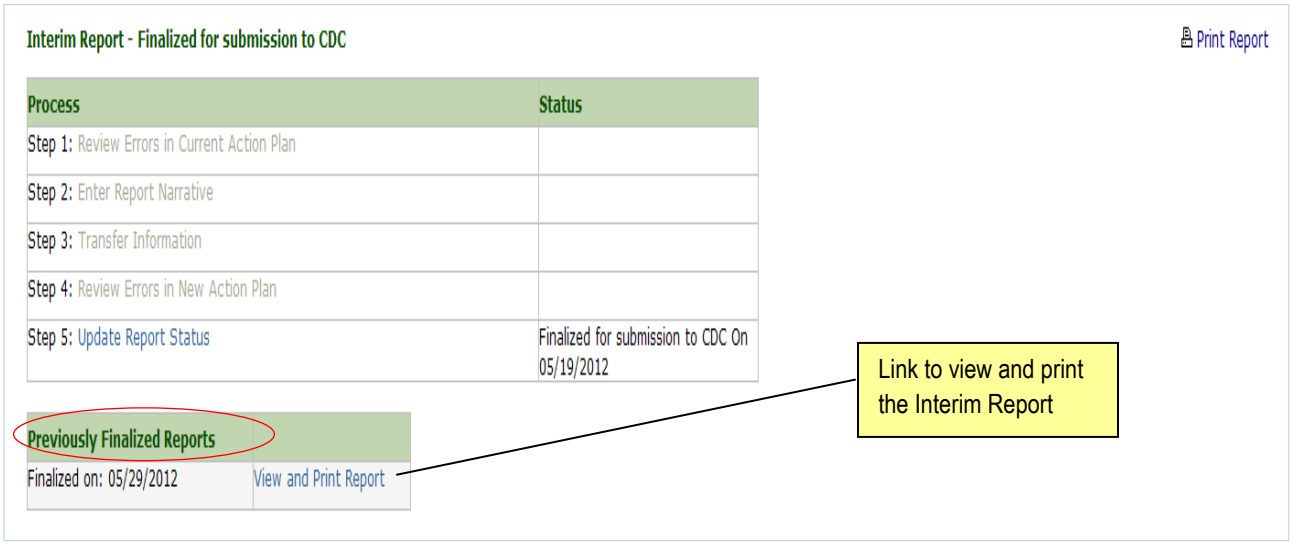
    - Saves the finalized Interim report and creates a PDF file of the report.
    - Allows you to view and print the PDF from the report Interim Report main page.
    - Disables all the steps of Interim Report (for non-CDC users).
    - Changes ‘Progress’ entries in the current year to ‘view only’ if the date of the entry is within the first six months of the reporting period.
    - Creates a ‘Previously Finalized Reports’ section on the Interim Report main page, where you can see the finalized date and also view and print the report.
    - Enables Step 1 of the Annual Report for the current budget year.

## Viewing and Printing a Report

To view and print the finalized Interim Report, follow the 2 steps below:

1. In the 'Previously Finalized Reports' section (located beneath the list of steps), click on the 'View and Print Report' link. The system displays a standard File Download window.

2. Click 'Open' to open the report, or click 'Save' to save the report to a location on your computer. (You can also save the report after you open it by clicking 'File' and then 'Save as' on the PDF.)




Important Notes about Reports

- The MIS does **not** submit the Interim Report to CDC; you must manually submit the report according to CDC and PGO guidance.
- If your report is not finalized in the MIS by the report due date, the report will be locked down and marked as "Past Due". If this occurs, you must contact your project officer to unlock the report for editing.
- If your report has been finalized by mistake, you must contact your project officer for assistance.
- If your report has been finalized and is then reverted to DRAFT status for any corrections, both the original and the newly submitted report will be saved in the MIS, and both reports will be displayed in the 'Previously Finalized Reports' section.

Important

- **The MIS does not submit the report. You need to print and submit the Interim Report to CDC according to CDC and PGO guidance.**
- **Please contact your Project Officer or Program Consultant if you have finalized the report in error.**

# Annual Report Instructions

In the 1st and 5th years of the FOA, the Annual Report section will be enabled regardless of the Interim report Status. In the 2nd through the 4th years, the Annual Report section will be disabled until the Interim Report is finalized.

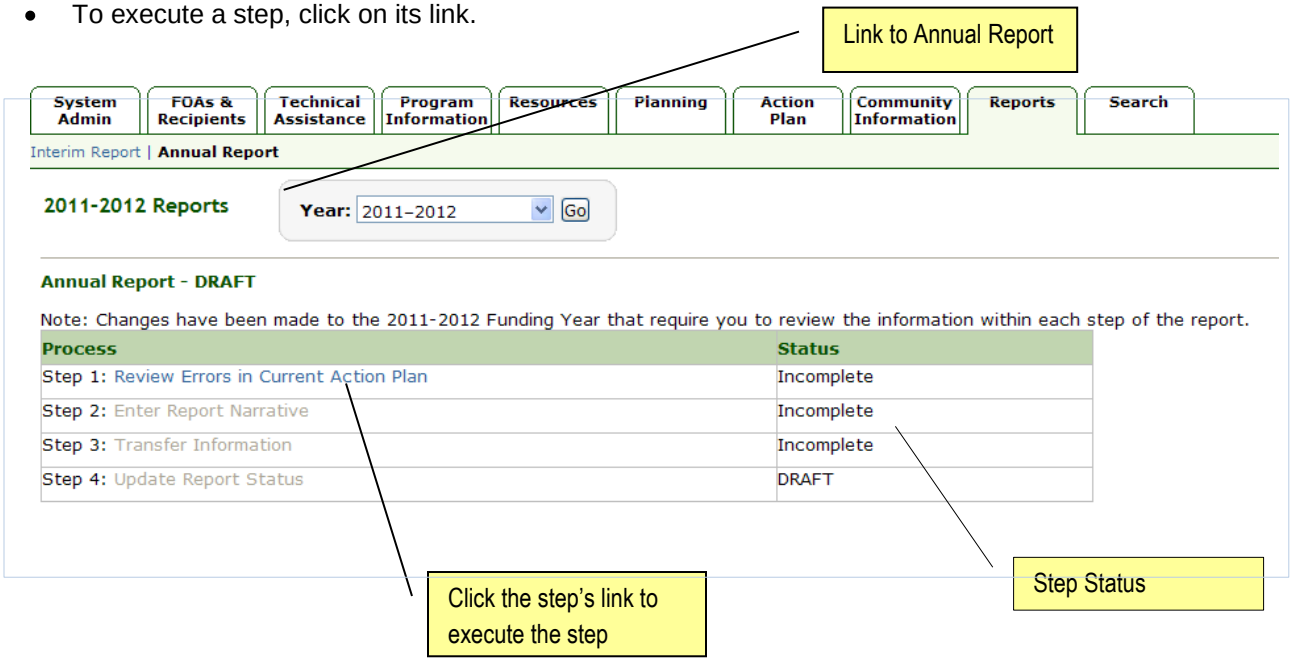
To create the Annual Report:

- Navigate to the Reports tab and click on the Annual Reports link. The MIS will guide you through the 4 steps required to create the Annual Report:
  - Step 1: Review Errors in Current Action Plan
  - Step 2: Enter Narrative Report
  - Step 3: Transfer Information
  - Step 4: Update Report Status

- Each step must be completed in the order shown. Subsequent steps are not accessible until the current step is complete.

- Initially, the status of each step is set to 'Incomplete'. As you finish a step, the status is automatically changed to 'Complete.'

- To execute a step, click on its link.



**Step 1: Review Errors in Current Action Plan**

- In Step 1, the MIS reviews the current Action Plan to check that information required for generating the Annual Report has been entered. The following information is required for the Annual Report:
  - Progress must be entered for each Project Period Objective
  - Progress must be entered for each Annual Objective for the second 6-months of the reporting period
  - At least one Activity must be entered for each Annual Objective

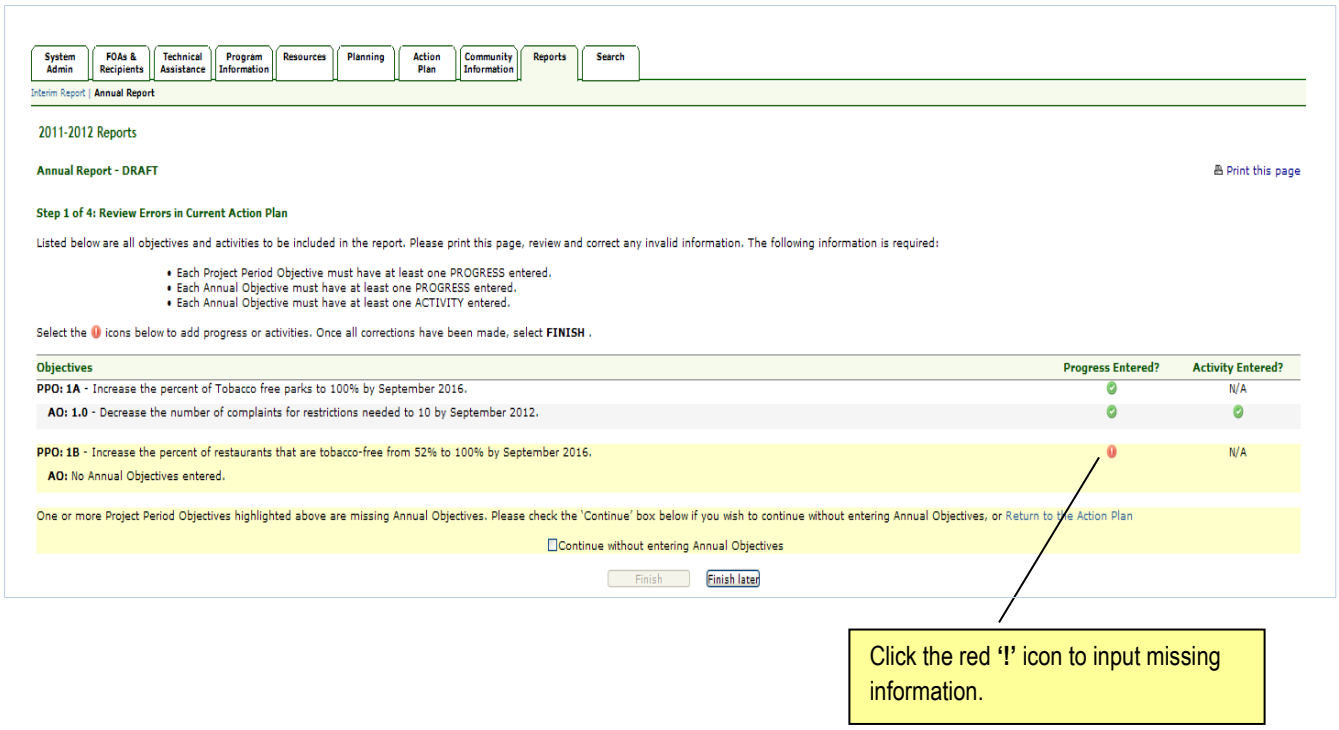
- The results of the system's Action Plan review are displayed:

  - Indicates information has been entered

  - Indicates information has not been entered

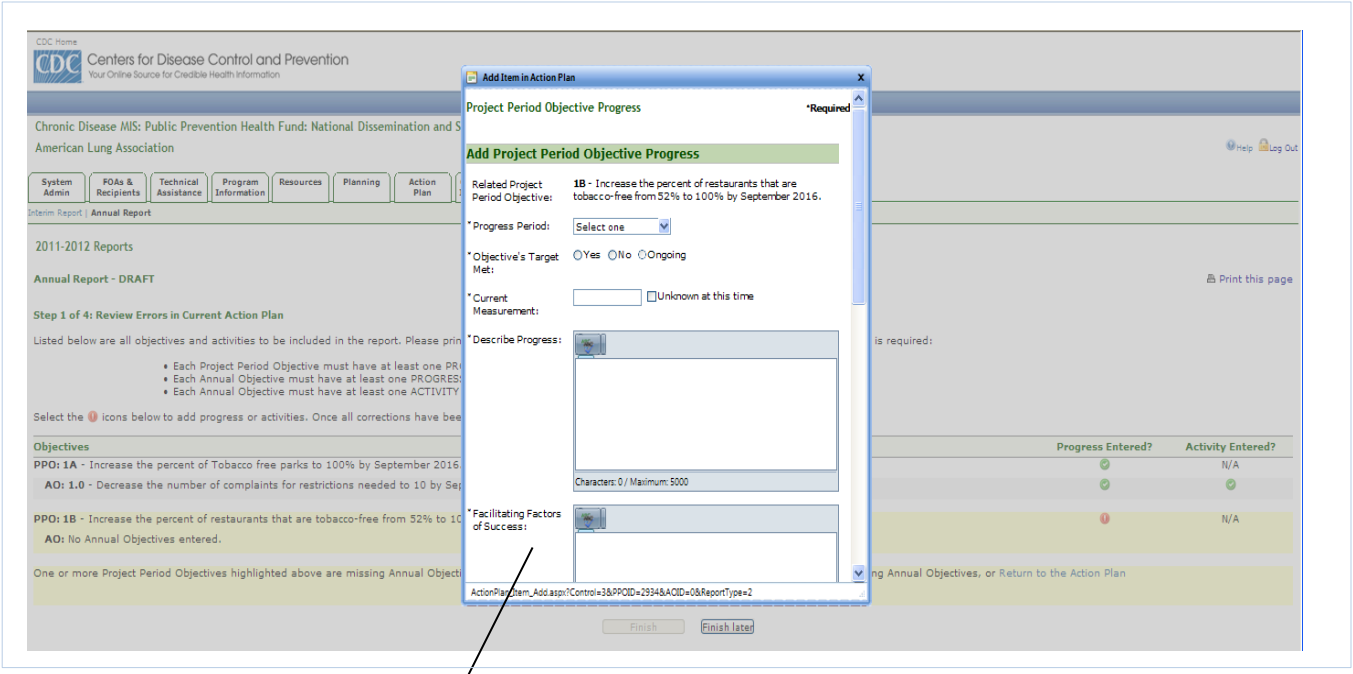
  N/A - Indicates information is not required

- To enter missing information: click on the red '!' icon and the page for entering the missing activity or progress will be displayed in a 'pop-up' window over the 'Step 1: Review Errors in Current Action' Plan page.



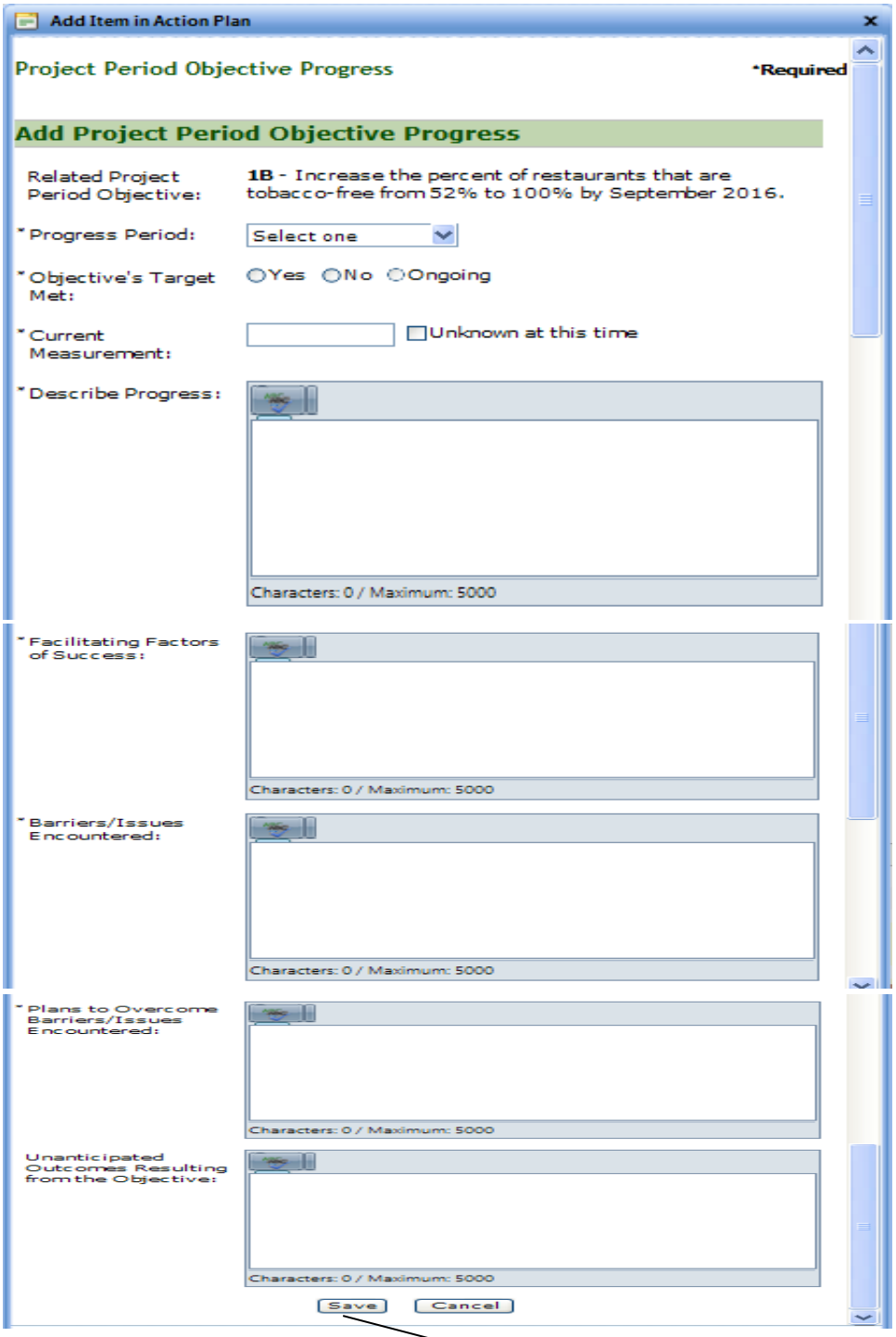

- Enter required information in the pop-up window and click 'Save.' The progress or activity entered will be saved in the current year's Action Plan.

- On the Review page, the red '!' icon will be replaced with a green '✓' icon.




Pop-up window to enter missing progress

Entire pop-up window

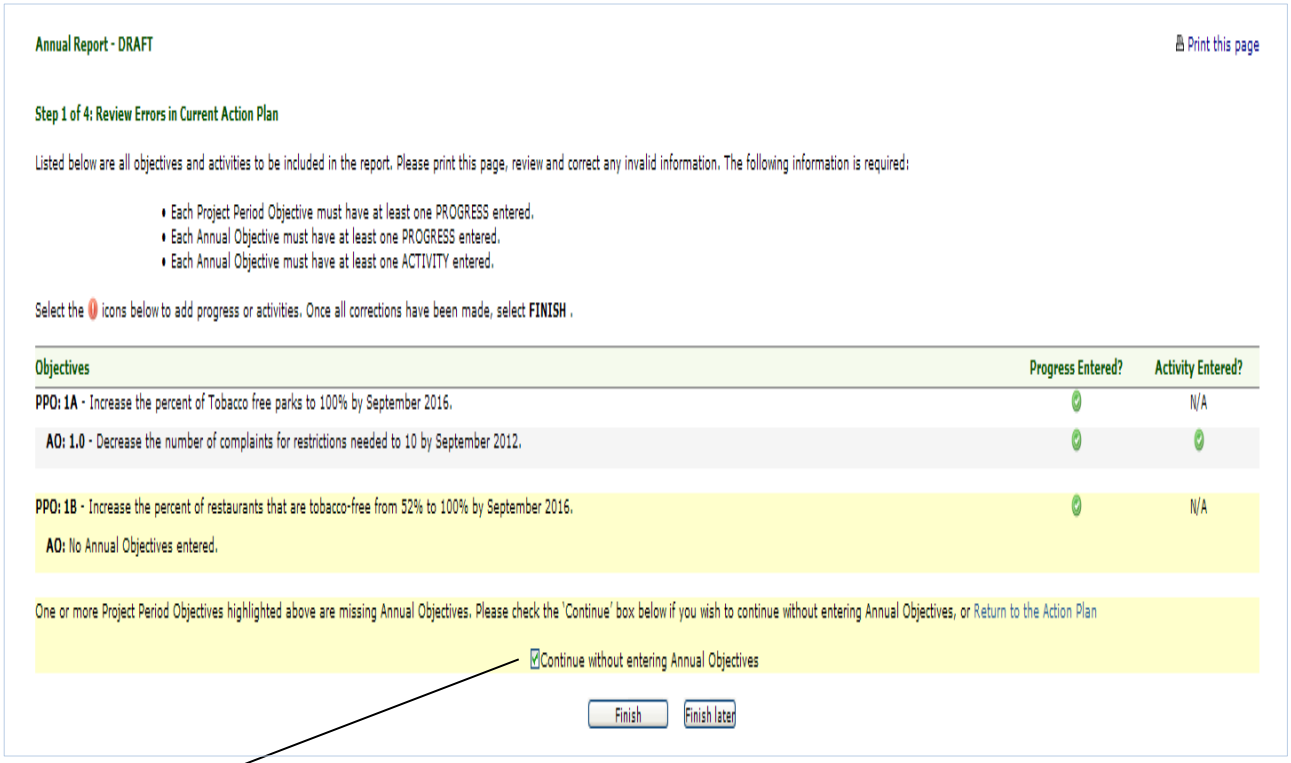



Click 'Save' after all information is entered.

## Missing Objectives Warning:

- Some programs require at least one Annual Objective for each Project Period Objective (PPO) entered in the Action Plan. The MIS checks for this condition and issues a warning message if it finds PPOs without Annual Objectives. Each PPO missing an Annual Objective is highlighted and a message with a check box to 'Continue without annual objectives' is displayed at the bottom of the page.

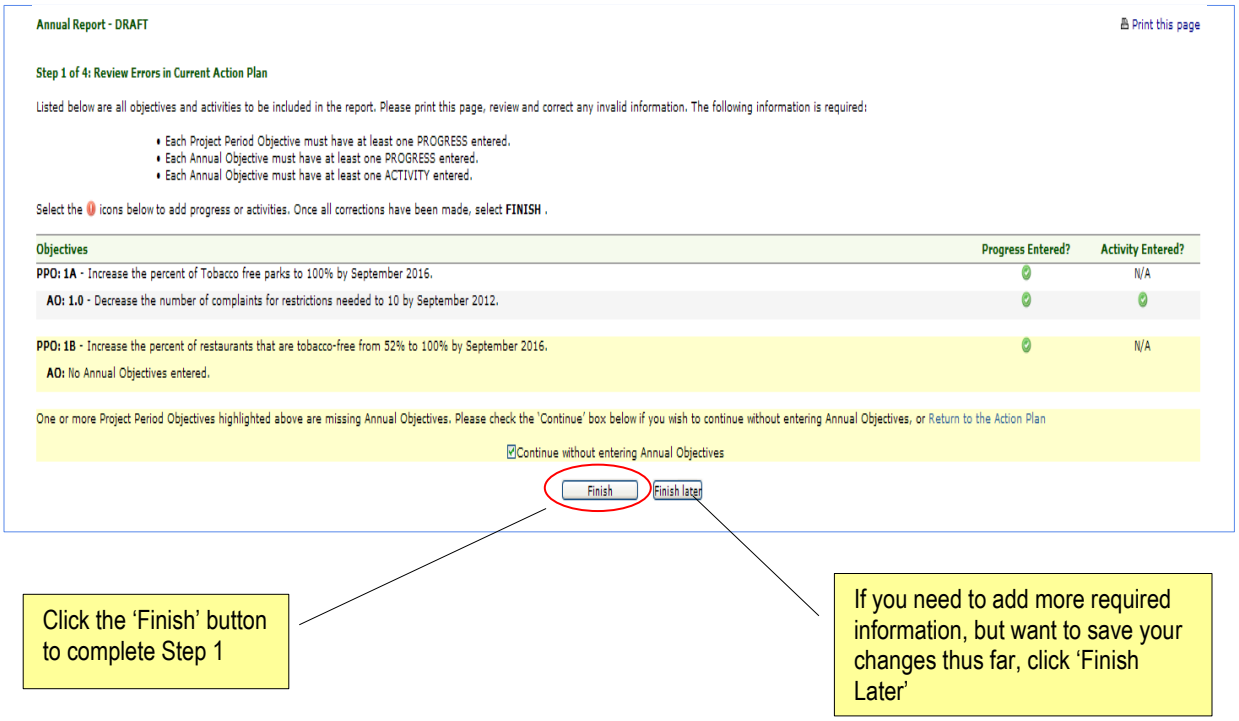
- If your program requires at least one Annual Objective for each PPO, **do not** check the 'Continue without Annual Objectives' check box. Instead, click the 'Return to the Action Plan' link to go back to the Action Plan and enter an Annual Objective for the highlighted Project Period Objective. (Please refer to you program guidance to determine if this applies to you. If your Program guidance allows a PPO to be entered without an Annual Objective, click the checkbox to continue.)




Check this box if you don't need to add Annual Objectives for the highlighted Project Period Objectives. This will enable the 'Finish' button.

- When all errors have been corrected and all icons are green, the 'Finish' button will be enabled. (If the PPO without Annual Objectives warning is displayed, the 'Finish' button will not be enabled until the 'Continue without Annual Objectives' box is checked or at least one Annual Objective is entered for the PPO.)
- Click the 'Finish' button to complete Step 1. This enables Step 2.

- If you are not able to add all the required activities or progress, you can click the 'Finish Later' button to save your changes and return to Step 1 later.




## Step 2: Enter Narrative Report

In Step 2, complete the field 'During the reporting period, please describe the most significant accomplishments including collaboration across other chronic disease programs (such as leveraged resources)' by describing in detail the most significant accomplishments by your program, how they were achieved, other chronic programs with whom you collaborated, etc.

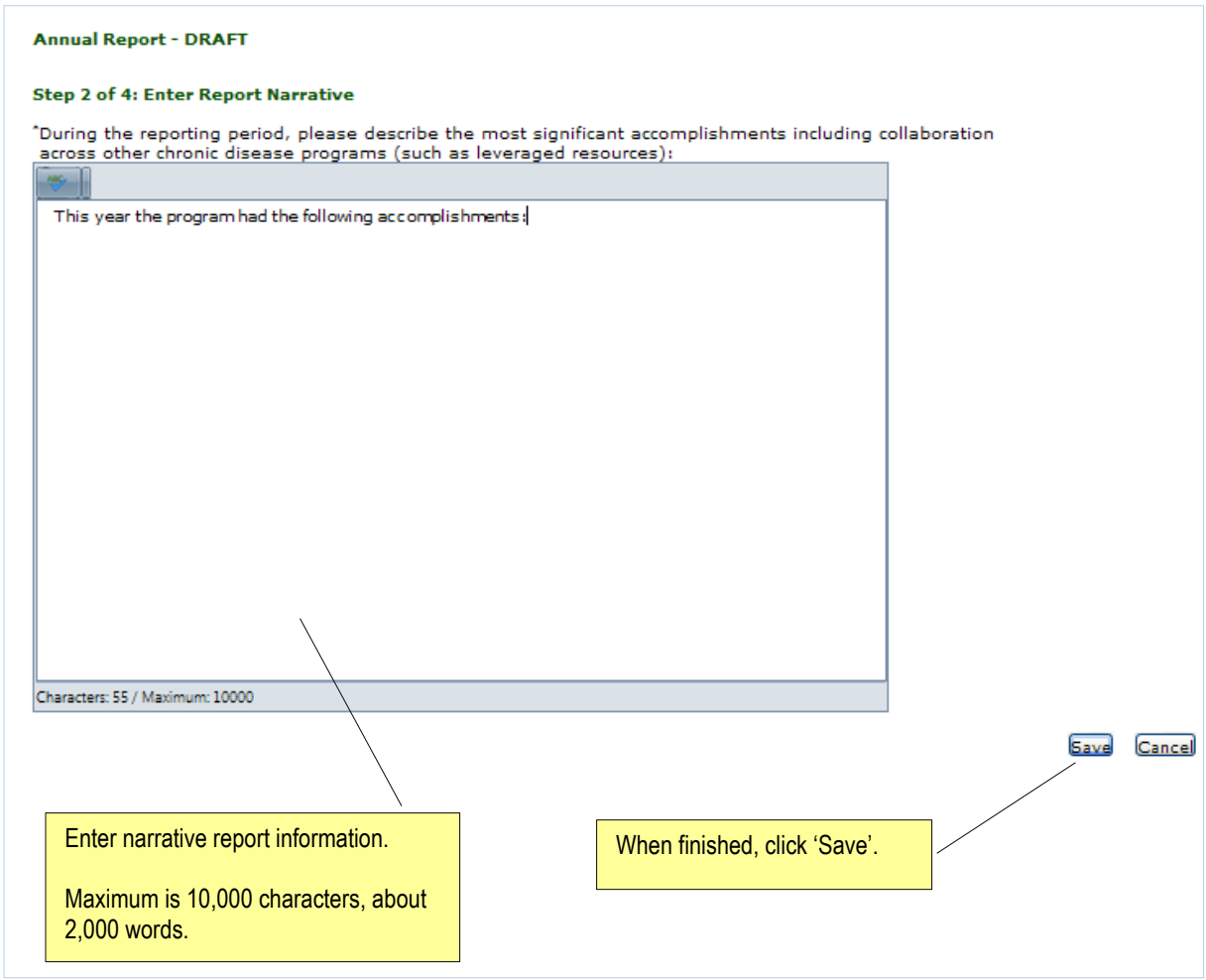
Maximum text is 10,000 characters or about 2,000 words. You may enter information directly in the text box, or cut and paste information from another application such as Microsoft Word.

To complete Step 2 of the Interim Report process:

1. Click on the 'Step 2: Enter Report Narrative' link. The system displays the 'Step 2 of 4: Enter Report Narrative' page.

2. Enter the information about your program's most significant accomplishments for the second 6 months of the reporting year, including collaboration across other chronic disease programs. (Note: the 'Save' button is disabled when the narrative field is blank and becomes enabled when text is entered.)

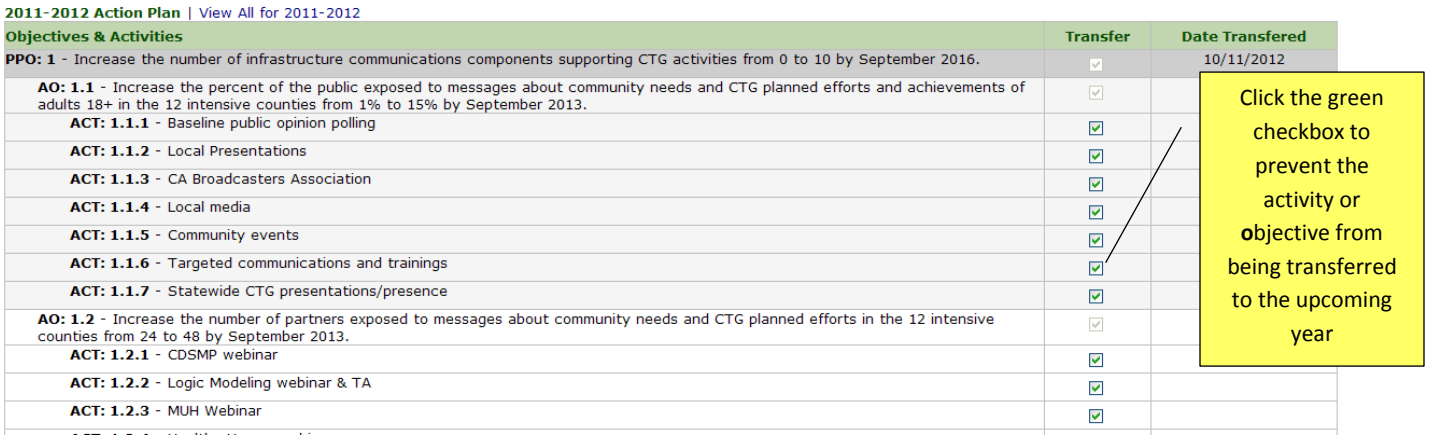
3. When finished entering information, click 'Save'. The system saves the narrative report, marks Step 2 as Complete, and enables the link for 'Step 3: Transfer Information'.
   *Note*: You can update the narrative report in Step 2 as often as necessary until the Annual Report is finalized in Step 4.

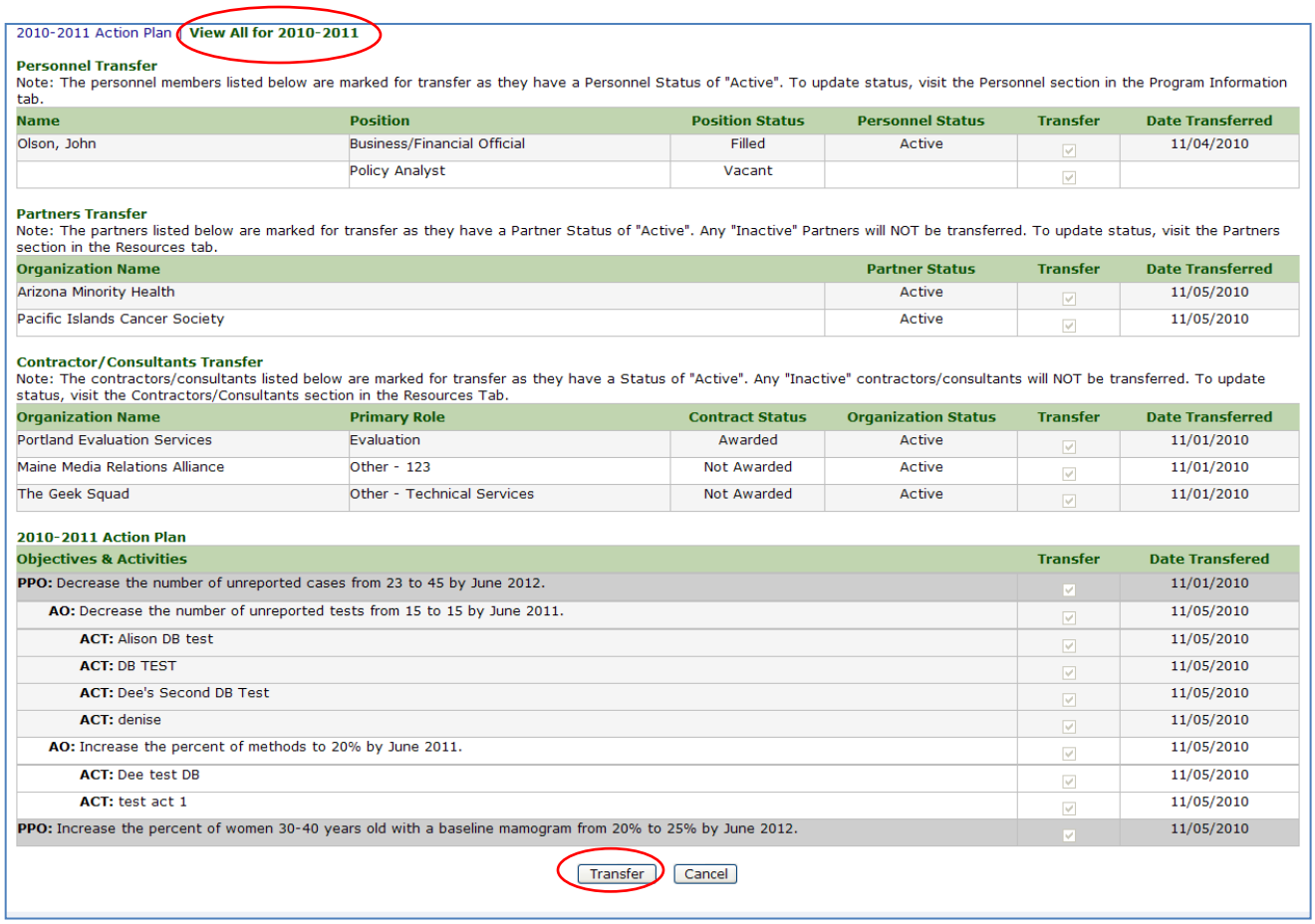

Annual Report - DRAFT
Step 2 of 4: Enter Report Narrative
*During the reporting period, please describe the most significant accomplishments including collaboration across other chronic disease programs (such as leveraged resources):
This year the program had the following accomplishments:
Characters: 55 / Maximum: 10000
Save
Cancel
Enter narrative report information.
Maximum is 10,000 characters, about 2,000 words.
When finished, click 'Save'.

## Step 3: Transfer Information

In Step 3 of the *Interim* Report process, the information from the current budget year was transferred to the upcoming year. The Annual Report transfer process checks for new information that might have been added since the Interim report was finalized, so that only new information will be transferred in this step.

- Click the link to execute Step 3.
- The Action Plan items selected for transfer will be displayed. Click the 'View All for YYYY-YYYY' link to see an expanded list of information that will be transferred from the Personnel, Partners, Contract/Consultant and Action Plan sections.
- Items that were transferred during the Interim Report Process, will be marked as checked in the 'Transfer' column and display the previously transferred date. These items will not be transferred again.
- Click the 'Transfer' button to have the selected items transferred to the upcoming budget year. The status of Step-3 will be changed to 'Complete' and Step-4 will be enabled. You may uncheck Action Plan items selected for transfer if you do not want them transferred to the upcoming year.
- If you add new information to the Action Plan after executing the Transfer step, the MIS will reset Step 1 to 'Incomplete', however, the status of Step 2 will remain 'Complete'. You will need to rerun both Step 1 and 'Transfer' again before proceeding to Step 4.
- To complete the transfer Step, click the 'Transfer' button at the bottom of the page.
- If you are *not* ready to complete the transfer step, click the 'Cancel' button to return to the Annual Report main page.
- You may uncheck Action Plan items selected for transfer if you do not want them transferred to the upcoming year. However, you must uncheck all associated Activities before you can uncheck an Annual Objective, and if you check an Annual Objective Activity, the Annual Objective will also become checked.





2010-2011 Action Plan | **View All for 2010-2011**

**Personnel Transfer**

Note: The personnel members listed below are marked for transfer as they have a Personnel Status of "Active". To update status, visit the Personnel section in the Program Information tab.

| Name | Position | Position Status | Personnel Status | Transfer | Date Transferred |
|---|---|---|---|---|---|
| Olson, John | Business/Financial Official | Filled | Active | ☑ | 11/04/2010 |
| | Policy Analyst | Vacant | | ☑ | |

**Partners Transfer**

Note: The partners listed below are marked for transfer as they have a Partner Status of "Active". Any "Inactive" Partners will NOT be transferred. To update status, visit the Partners section in the Resources tab.

| Organization Name | Partner Status | Transfer | Date Transferred |
|---|---|---|---|
| Arizona Minority Health | Active | ☑ | 11/05/2010 |
| Pacific Islands Cancer Society | Active | ☑ | 11/05/2010 |

**Contractor/Consultants Transfer**

Note: The contractors/consultants listed below are marked for transfer as they have a Status of "Active". Any "Inactive" contractors/consultants will NOT be transferred. To update status, visit the Contractors/Consultants section in the Resources Tab.

| Organization Name | Primary Role | Contract Status | Organization Status | Transfer | Date Transferred |
|---|---|---|---|---|---|
| Portland Evaluation Services | Evaluation | Awarded | Active | ☑ | 11/01/2010 |
| Maine Media Relations Alliance | Other - 123 | Not Awarded | Active | ☑ | 11/01/2010 |
| The Geek Squad | Other - Technical Services | Not Awarded | Active | ☑ | 11/01/2010 |

**2010-2011 Action Plan**

| Objectives & Activities | Transfer | Date Transfered |
|---|---|---|
| **PPO:** Decrease the number of unreported cases from 23 to 45 by June 2012. | ☑ | 11/01/2010 |
| **AO:** Decrease the number of unreported tests from 15 to 15 by June 2011. | ☑ | 11/05/2010 |
| **ACT:** Alison DB test | ☑ | 11/05/2010 |
| **ACT:** DB TEST | ☑ | 11/05/2010 |
| **ACT:** Dee's Second DB Test | ☑ | 11/05/2010 |
| **ACT:** denise | ☑ | 11/05/2010 |
| **AO:** Increase the percent of methods to 20% by June 2011. | ☑ | 11/05/2010 |
| **ACT:** Dee test DB | ☑ | 11/05/2010 |
| **ACT:** test act 1 | ☑ | 11/05/2010 |
| **PPO:** Increase the percent of women 30-40 years old with a baseline mamogram from 20% to 25% by June 2012. | ☑ | 11/05/2010 |

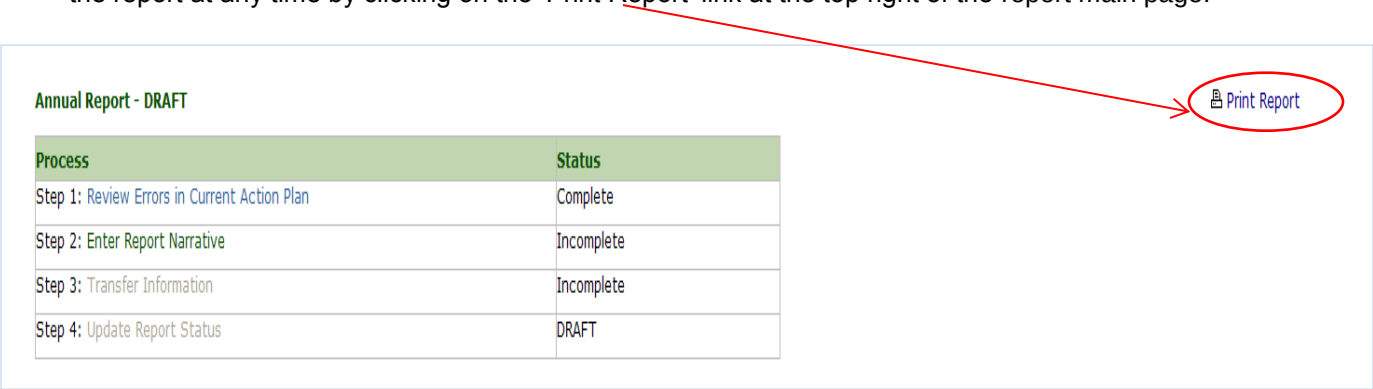
Transfer | Cancel

**Note**

Project Period Objective (PPO) **Progress** and Annual Objective **Progress** cannot be transferred to the upcoming year. Progress must be entered on an annual basis; entered at least once for each PPO, and entered twice for each Annual Objective.

## Step 4: Update Report Status

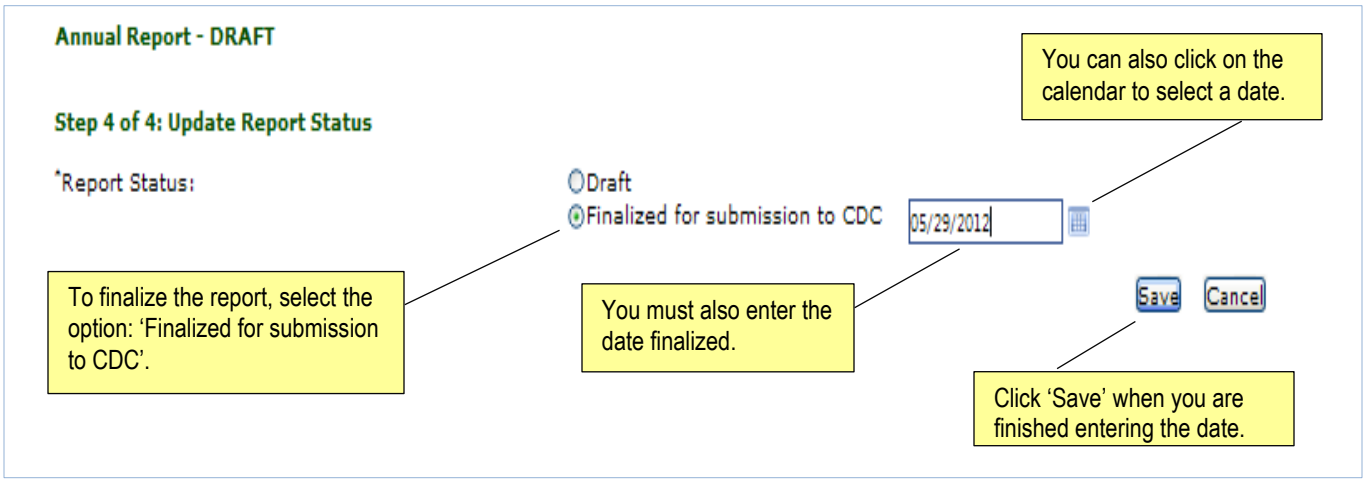
- Step 4 allows you to finalize the Annual Report.
- Click on the link to execute Step 4. The 'Step 4 of 4: Update Report Status' page will be displayed.
- Before you finalize the Annual Report, the report status will automatically display 'Draft.' You can view a draft of the report at any time by clicking on the 'Print Report' link at the top right of the report main page.




### Finalizing the Annual Report

To finalize the Annual Report, you must complete Step 4 of the Annual Report process:

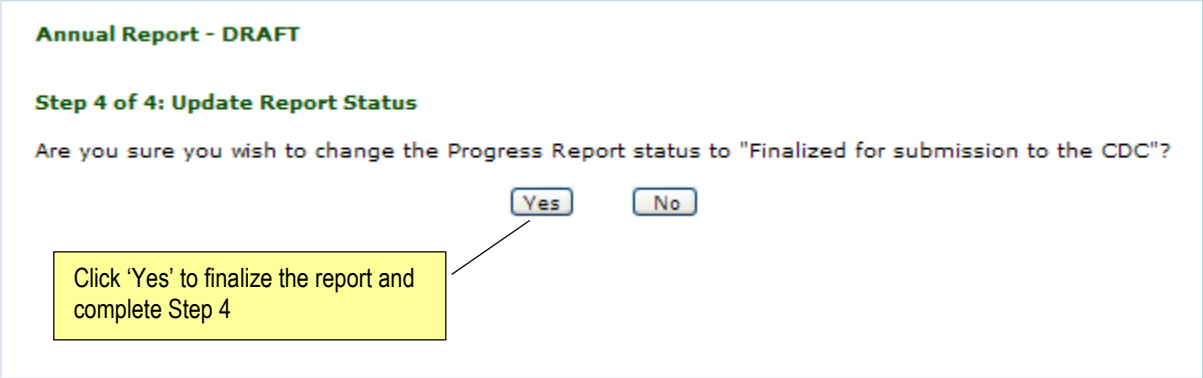
1. Click on the Step 4 link.
2. In the Report Status field, select the 'Finalized for submission to CDC' option.
3. Enter the submission date into the text box in the format MM/DD/YYYY. (You can also click the calendar icon to select a date.) This field is required.
4. Click the 'Save' button. (*Note:* The 'Save' button only saves the selected 'Report Status', it does NOT finalize the report.)



5. After you click the 'Save' button you will be prompted to confirm changing the report status from 'Draft' to 'Finalized'.

    - Click the '**Yes**' button to complete the finalization process. The report status will be updated to 'Finalized' and the submission date will be entered. A link to view and print the finalized Annual Report will be displayed on the report main page.

    - Click '**No**' to cancel the report finalization and return to the 'Update Report Status' page where the report status will change back to 'Draft'.




6. After you click 'Yes' on the confirmation message, the system saves the finalized status and the submission date you entered. The system also does the following:

    - Saves the Annual Report and creates a PDF file of the report.
    - Allows you to view and print the PDF from the Annual Report main page.
    - Disables all steps of Annual Report (for non-CDC users).
    - Changes all information in the current year to "view only," (i.e., *Add*, *Edit*, and *Delete* links are no longer available in the current year).
    - Creates a 'Previously Finalized Reports' section on the Annual Report main page, where you can see the finalized date and also view and print the report.
    - Enables Step 1 of the Interim Report for the upcoming budget year.
    - *Note:* for those FOA's that require that each Project Period Objective have at least one associated Annual Objective, if a Project Period Objective does not have an Annual Objective, the system will not save the report.

**Note**

- The MIS does **not** submit the Annual Report. You need to print and submit the Annual Report to CDC according to CDC and PGO guidance.
- Please contact your Project Officer or Program Consultant if you have finalized the report in error.

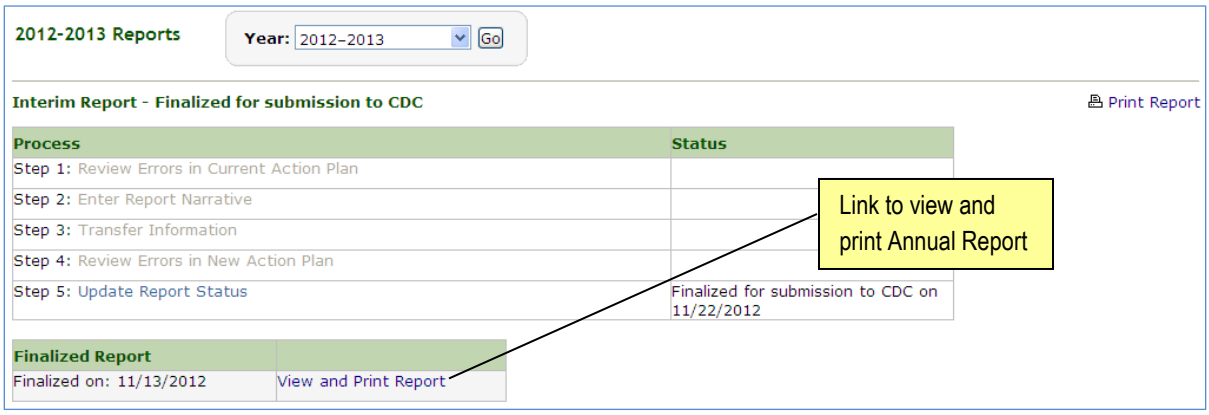
## Viewing and Printing a Report

To view and print a finalized Annual Report, follow the steps below:

1. If you have just generated the finalized report, check the report status by clicking My Reports at the top right of the Reports page. When the report is ready, click “Clear this request” in the My Reports pop-up window to refresh the Reports page.

2. In the ‘Finalized Reports’ section (located beneath the list of steps), click the ‘View and Print Report’ link. The system displays a standard File Download window.

3. Click ‘Open’ to open the report, or click ‘Save’ to save the report to a location on your computer. (You can also save the report after you open it by clicking ‘File’ and then ‘Save as’ on the PDF.)




### Important Notes about the Reports

- The MIS does not submit the Annual Report to CDC; you must manually submit the report according to CDC and PGO guidance.
- If your report is not finalized in the MIS by the report due date, the report will be locked down and marked as “Past Due”. If this occurs, you must contact your Project Officer to unlock the report for editing.
- If your report has been finalized by mistake, you must contact your Project Officer for assistance.
- If your report has been finalized and is then reverted to DRAFT status for any corrections, both the original and the newly submitted report will be saved in the MIS, and both reports will be displayed in the ‘Previously Finalized Reports’ section.

**Important**

- **Remember to Print and Manually Submit the Annual Report to CDC according to CDC and PGO guidance.**
- **Please contact your Project Officer or Program Consultant if you have finalized the Annual Report in error.**
- **Finalizing the Annual Report will close out the current budget year. You may view the information for the closed year in the MIS, but will not be able to change any data.**